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# Information literacy & Portal solutions

University of Tartu, Estonia

12.12.2008

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# University of Konstanz

- Founded in 1966
- Nearly 10.000 students (16 from Estonia)
- 174 professors
- Focus in (natural) sciences, humanities and social sciences (not: medicine and engineering)
- One of nine German Excellence universities

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# The Library

- One-track, open shelves, Konstanz shelf classification
- Situated in te heart of the campus
- 2 million volumes
- Acquisition budget 2008 about 3.5 million €
- Opening hours (nearly) 24/7
- 96 staff, thereof 9 subject librarians
- Strongly user committed (mission statement)
- Close cooperation with university IT services (KIM)
- Highly ranked every year within the most important German university ranking (CHE),
  1st rank in German library index (BIX) in 2008
  (2nd 2004-2007)

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# Library IT

- IT systems used in the library:
  - Integrated library system (Libero, Australia), library part of South west German union catalogue
  - Federated search engine Elektra (OCLC Pica)
  - SFX linkresolving (ExLibris)
  - Refworks and Endnote campus license
  - Institutional repository (KOPS)
  - eLearning platform (ILIAS)
  - ...

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# Information literacy: Experiences from the University of Konstanz (and other institutions)

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# Topics

1. Integration into the curricula: IL for beginners
2. Courses and consulting: IL for advanced academics
3. IL and the subject librarians
4. Bibliographic management software
5. …

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# 1. Integration into curricula: IL for beginners

- Bologna process
- Design of new study plans from 2002 until now
- Key qualifications as starting point: Most study plans include kq. Students can chose from a wide range
- Humanities, Social sciences and natural sciences
- Natural sciences: Break since 2007
- 4-5 courses per semester, 5 to 50 students
- Strictly level- and subject based:

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# Courses for BA students

| Subject | Every... | Weekly | Credits |
|---|---|---|---|
| Germanic studies | Summer semester | 2 | 3 |
| Romanic studies | Other winter semester | 2 | 3 |
| Slavonic studies | Other summer | 2 | 3 |
| Linguistics | Other winter semester | 2 | 3 |
| Media science | Other summer | 2 | 3 |
| Philosophy (obligatory) | Every semester | 2 | 3 |
| History (obligatory) | Every semester | 2 | 3 |
| Political science | Summer semester | 2 | 3 |
| Economics | Summer semester | 1 | 0 |
| Psychology | Every semester | 2 | 3 |
| Sociology | Every semester | 2 | 3 |
| Pedagogy | End of winter semester | ? | ? |
| Chemistry, Life Sciences and Biological Sciences | Break at the moment | | |

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# Topics of an IL course (BA level)

1. World of information, publication process
2. Search strategy, especially evaluation
3. Citation and bibliographic management
4. Subject specific catalogues, databases, internet sources
5. Subject specific topics: statistical data, working papers, classic editions etc.

Method: activity centered, problem oriented (lab with 30 PC)

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# Examinations

- Search documentation (written paper):
  (Student‘s topic – search strategy – keywords – databases – results – bibliography…)
  Appropriate method, but very time-intensive!
- Protocols
- Papers and presentations
- Written exams (large groups)
- …

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# Other models

- Free workshops
- eLearning
- Integrated modules in lectures, courses, seminars of university teaching staff (1-3 hours)
  - Less time-intensive
  - Less content to teach
  - Highly topic-oriented
  - Higher outreach
  - Mostly obligatory for the students
  - Stronger contact to faculty

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# Marketing: Students

- Obligatory courses…
- Integration into curricula with credit points
- Key qualification
- Strong contact with faculty (recommendation)
- Integration into the university-wide course catalogue
- …

- Marketing: University? Library director? Librarians?

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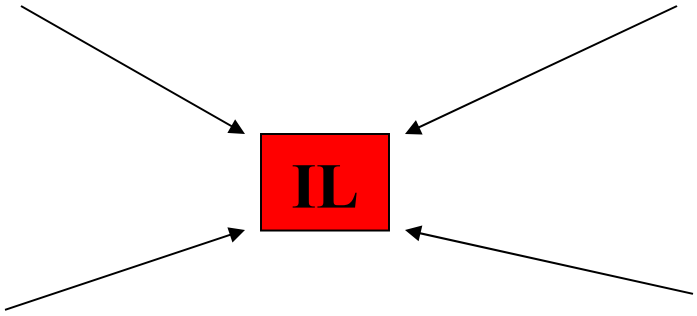
Library

University

Support:
Library director

Interest +
Contacts +
assistance
of/for subject
specialists




Searching for key
qualification
courses

Good reputation
of the library

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# Plans for the future

- Consolidation
  (More competition within the university)
- New topics
  (e.g. economics: visits at german central library for economics, information departments of companies)
- More subjects
  (again: sciences)
- Workload reduction

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# 2. IL for advanced academics

- Result of many studies:
  Need of doctoral students, post-docs etc.
- Project (external funds) especially for this target group (research and concrete measures) 2006-08
- 3 questions:
  - Again: Is there really a need?
  - How to reach and teach them?
  - What to teach them?

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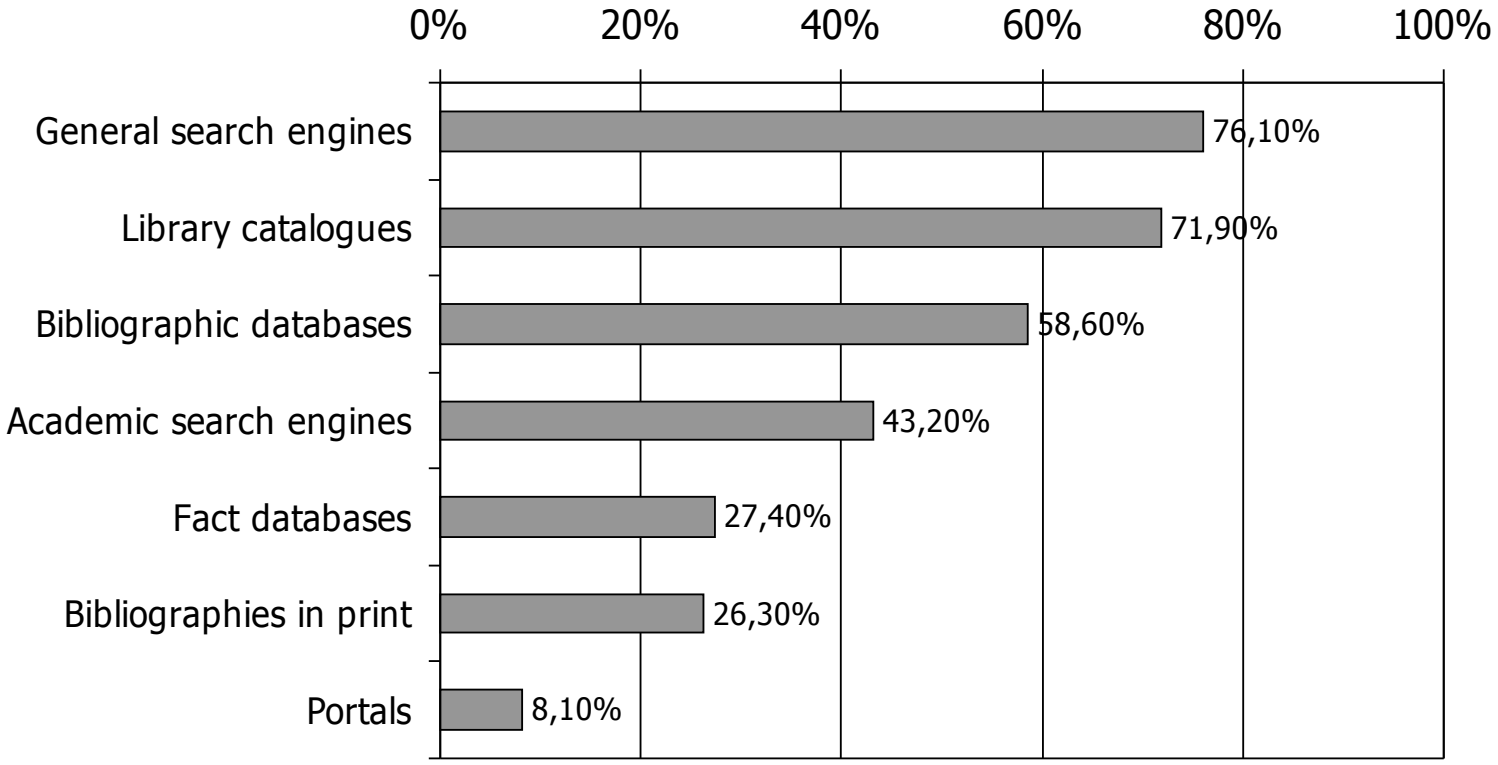
# **The need:** Information competencies

## Sources for the investigation of research results (Konstanz graduate study, n=285)



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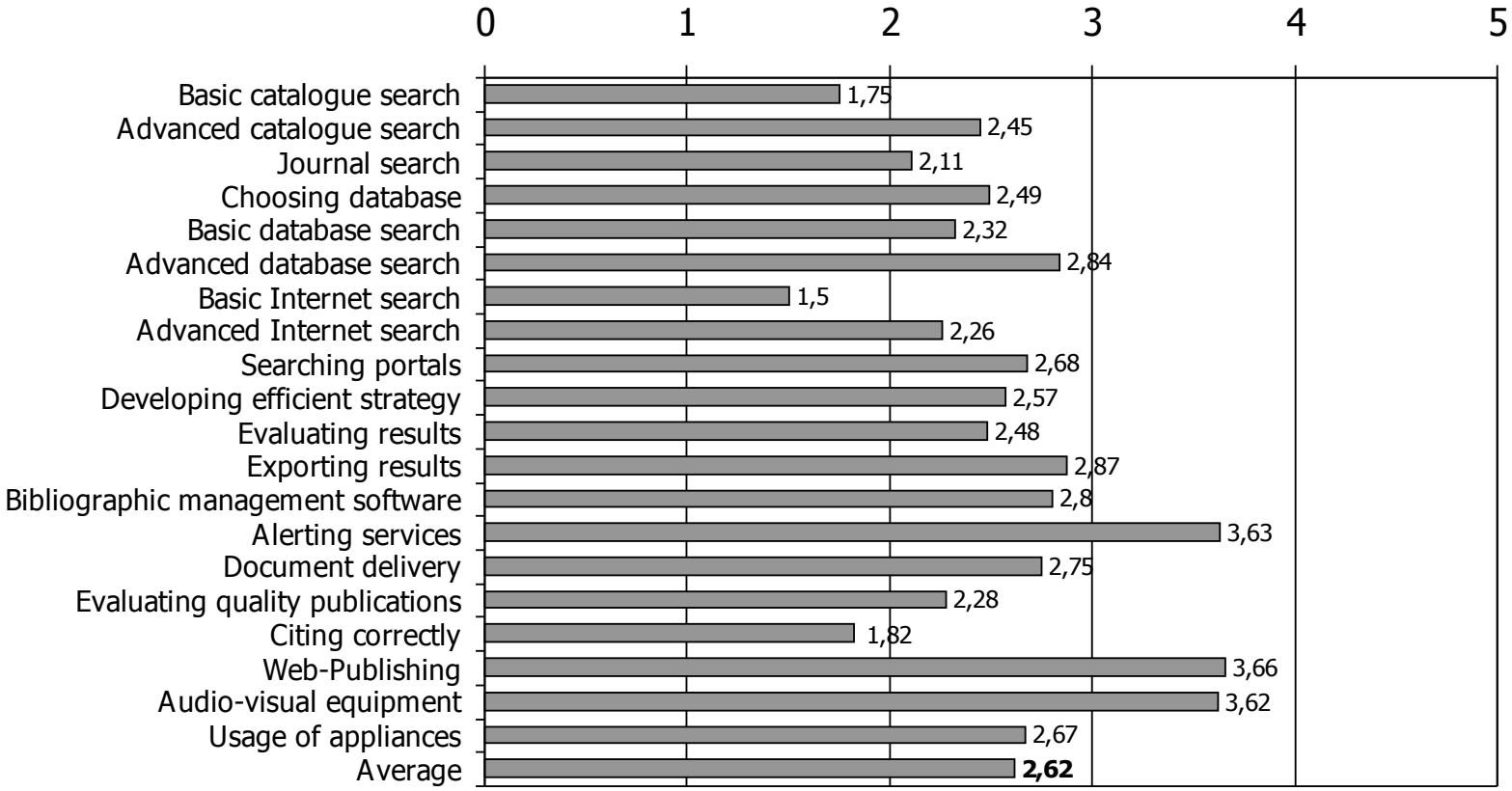
# **The need:** Information competencies

## Self assessment (1=very high, 5=very low) (Konstanz graduate study, n=285)



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# How to reach and teach them?

- Courses:
  - Master students:
    political science (obligatory), psychology, sports sciences (obligatory, next year)
  - Doctoral students:
    Study plans still in the making, most of them include key qualifications (first attempt winter semester 2008/09)

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# Master course in Political science: What?

- Repeat most of the BA topics (very diverse level)
- Additional topics:
  - More focus on BMS
  - Publication landscape (Publishing your own work, Open Access etc.)
  - Interdisciplinary sources: Law, economics, European Union publications and so on
  - Academic writing (small unit)
  - Plagiarism (small unit)

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# Doctoral students: How and what?

- Interdisciplinary idea (saving resources)
  - Generic part: Search strategies, electronic publishing, academic writing, Open Access, BMS, plagiarism
    - Whole group
    - Given by Information literacy librarian etc.
  - Subject specific parts: publication cultures of subjects, subject specific databases and other sources, etc.
    - Small subject groups
    - Given by subject specialists

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# Specific problems

- Winter term: 22 doctoral students
- Huge diversity of knowledge
- Problem of self-image
- Not every week, but 5-6 appointments (4 hours)
- More consultation than presentation
- Credit points (interdisciplinary)

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# **The approach:**
# Different methods?

- Adult learning theory: Learner‘s…
  - … experiences (as basis for further learning)
  - … readiness to learn (subjective relevance)
  - … self-direction (integration)
  - … problem-centered approach

    (Malcolm Knowles, The adult learner)

- Different role of the librarian:
  Facilitator, consultant or moderator rather than a teacher

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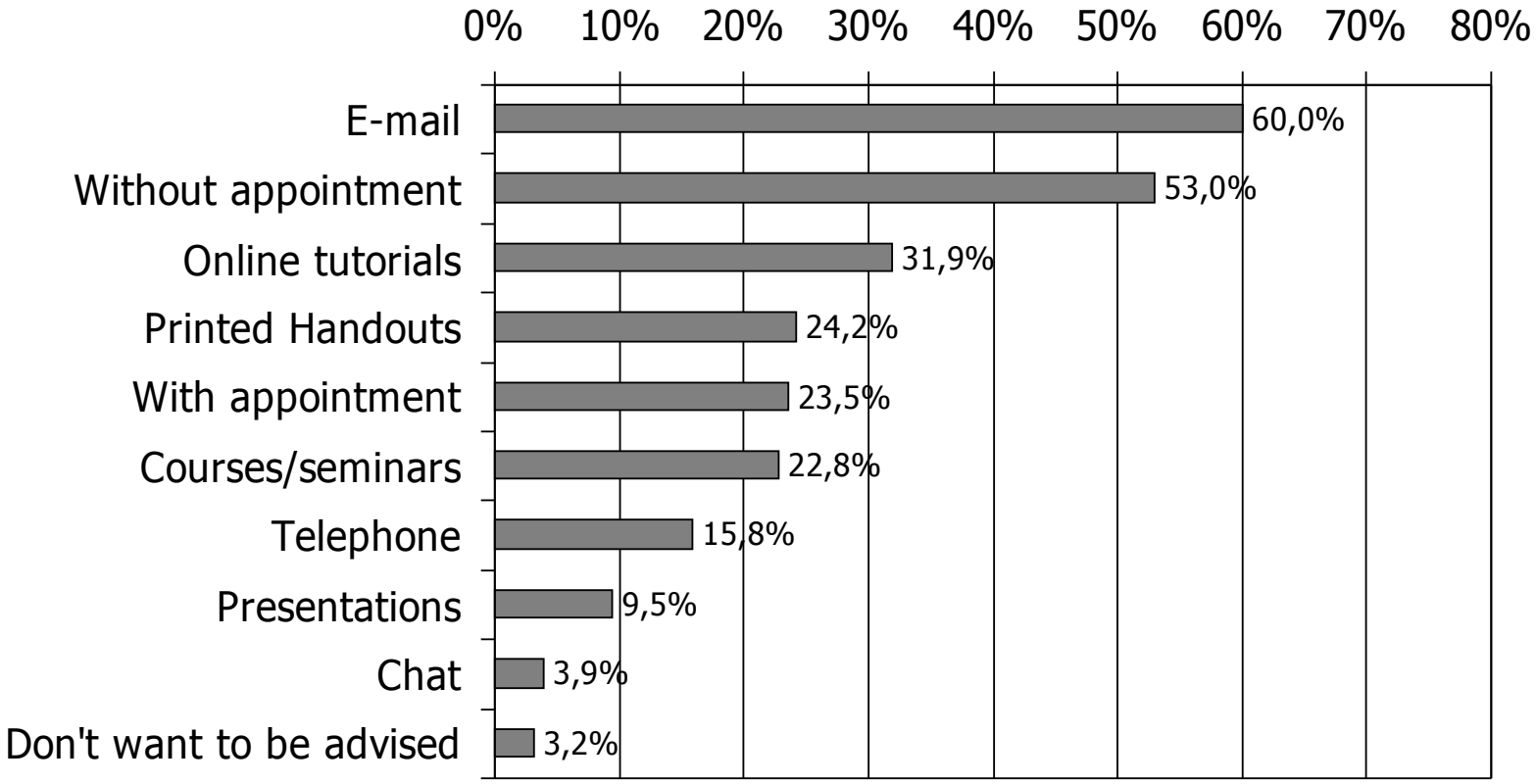
# **The approach:** Different methods?

## How do you want to be advised?
## (Konstanz graduate study, n=285)



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# Post-docs?

- Heterogenity!
- Time budget!
- Diffusion of information into the target group? (Marketing)
- Self-Image: Is there a need?

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# Possibilities

- Free workshops
  - Topics: BMS, Publishing, OA, Copyright, Bibliometrics,…
  - Marketing: eMail, Library blog
- Consulting:
  - Same topics
  - Marketing, contact: Subject specialists
- eLearning:
  - KoPILOT
  - Same Marketing

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# Integration in a (post)graduate school

- Presentations in graduate schools
- Presentations in a post-doc institution: Zukunftskolleg
  - Interdisciplinary research institution for excellent junior researchers (post-docs)
  - Money, freedom, image, doctoral project groups
  - Part of the institutional strategy
  - Library part: subject specialists (information policy), special services (document delivery), 2-3 presentations a year

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# 3. IL and subject specialists

- High potential for subject specialists
- Integration of IL as interesting job in fields of work
- Deeper contact to University
- Know the needs of students and academics better
- Reputation as a teacher within faculty
- Younger and older librarians
- Part of the regular target definitions with director (once a year)
- Part of new job offers

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# But…

Heavy workload: Course with 2 hours per semester needs one day work (20%)!

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# Support for subject specialists

- Student assistants (especially for local classification)
- Help from reference librarians
- New position: Information literacy librarian (funded from tuition fees)
- 2 projects (external funds): (1) to built up a toolbox (prototype course) in IL and (2) do research in IL, especially for academics
- eLearning platform with IL modules
- Workshops in instructional methods (pedagogy)
- IL meetings (3-4 times a year) for knowledge (and problem) exchange
- Wiki with modules, presentations etc. for own use

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# 4. BMS as a service and IL topic

- Eperiences from other universities, e.g. Manchester (published), USA (talks)
- Intensive testing 2006/07:
  - Refworks site licence since 2007
    - Web-based, appropriate for students
    - About 500 accounts (10% of student population)
  - Bibliographix since 2007
    - German product, desktop-based
  - EndnoteWeb since 2008 (included in Web of Science)
- Free of charge for all students and academics

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# And Endnote?

- Problems with this services:
  - No RefWorks offline version available
  - No connection from Bx to many databases
  - No full Endnote functionality in EndnoteWeb

- More and more questions concerning Endnote
- More and more Mac-Users (Bx does not work with)

- Endnote 3 years site licence 2009-11 for all academics and students

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# A Trojan horse?

- BMS as a tool that makes life (or work) much easier for students and academics
- High interest in BMS workshops, strong use of the products and a lot of one-to-one consulting
- Sneak in catalogues and databases through the use and training of BMS: Students and academics discover library resources they did not know before

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# Future plans

- Consolidation and broadening of the services for beginners and especially for academics
- Further funding for IL iniatives:
  - More resources for IL librarian from university, especially for undergraduates, so that subject librarians have more time for academics
  - New research project to find technical solutions: IL support at the point of need (integrating library services and IL tools into individual web portals like iGoogle)

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Thank you very much.

Let‘s start questions, discussion and so on…

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# Portal solutions:
# Experiences from the University of Konstanz

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# Portals!

Which door does the user want?

We do not know.

But we try hard to figure it out and offer solutions…

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# For what reason?

- Model A:
  Portal to include decentral sources of one university or library, e.g. decentralized branch library catalogues and manuscript databases and institutional repositories and so on („under library control")
- Model B:
  Portal to build up one search interface for external sources, e.g. bibliographic (books, articles) and fulltext databases
- …

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# The novice user

Novice: uses Google, is familiar with that (and thinks he knows all the hidden tricks).

1. Everything is in Google.
2. And everything should be like Google.

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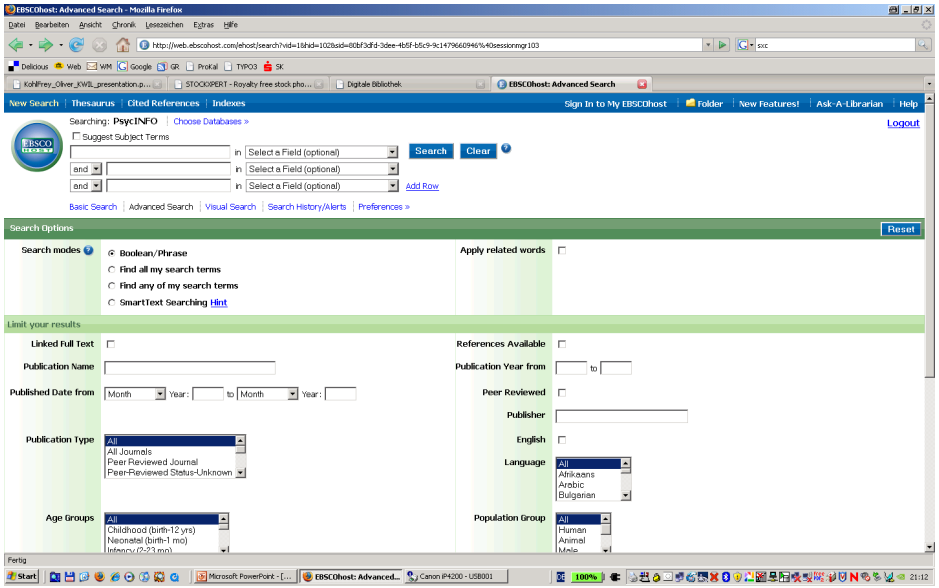
# The expert user

Expert: Uses **his** special database, really knows all the hidden tricks. But he is probably not happy with the usability and he does not know other sources.



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# The librarian

- Most important: Library catalogue
- Even more important: Bibliographical standards
- Different databases for different contents
- User has to learn (on his own or in information literacy courses)
- Easy to administrate
- …

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# The user perspective (my personal view)

- Easy to use
- Different search options for novice and expert users
- All content (all subjects, books, journals, papers…)
- Getting fast… sufficient… and reliable results
- Completeness?
- Full text check
- State of the art Catalogue 2.0 features:
  - Drill down
  - MyProfile
  - Export to BMS
  - …

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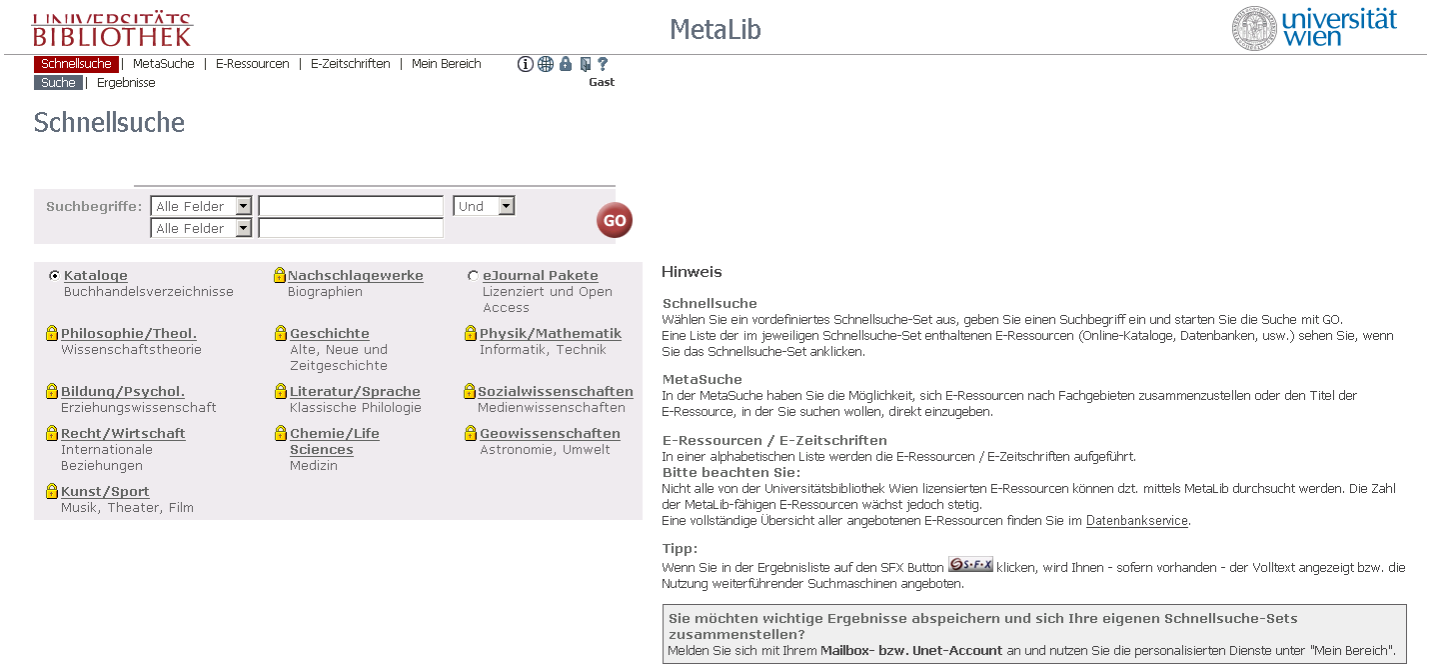
# Model B: Federated search

- MetaLib (ExLibris), Elektra or InfoPoint (OCLC Pica)
- …



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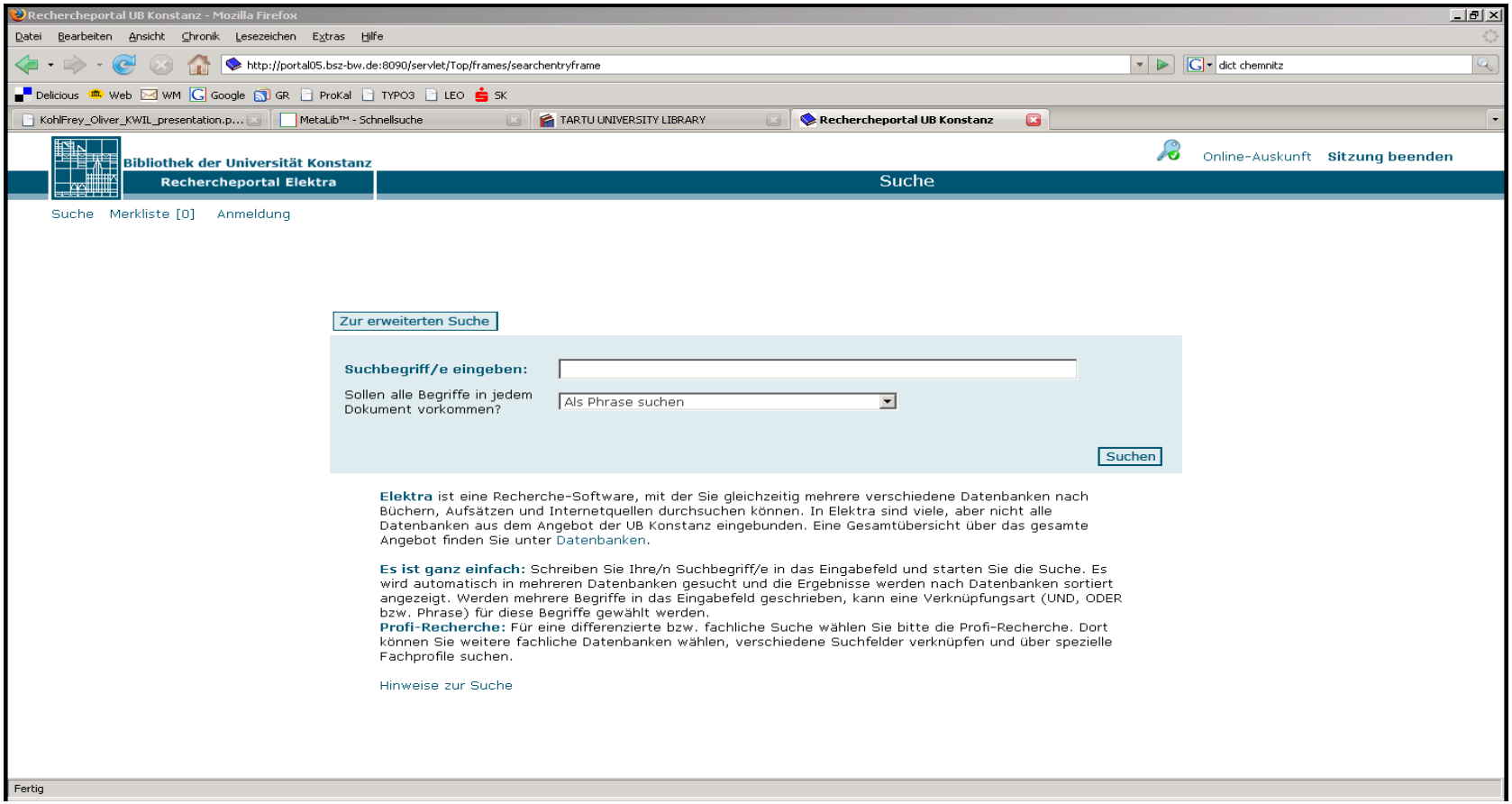
# Konstanz: Elektra (Simple search)



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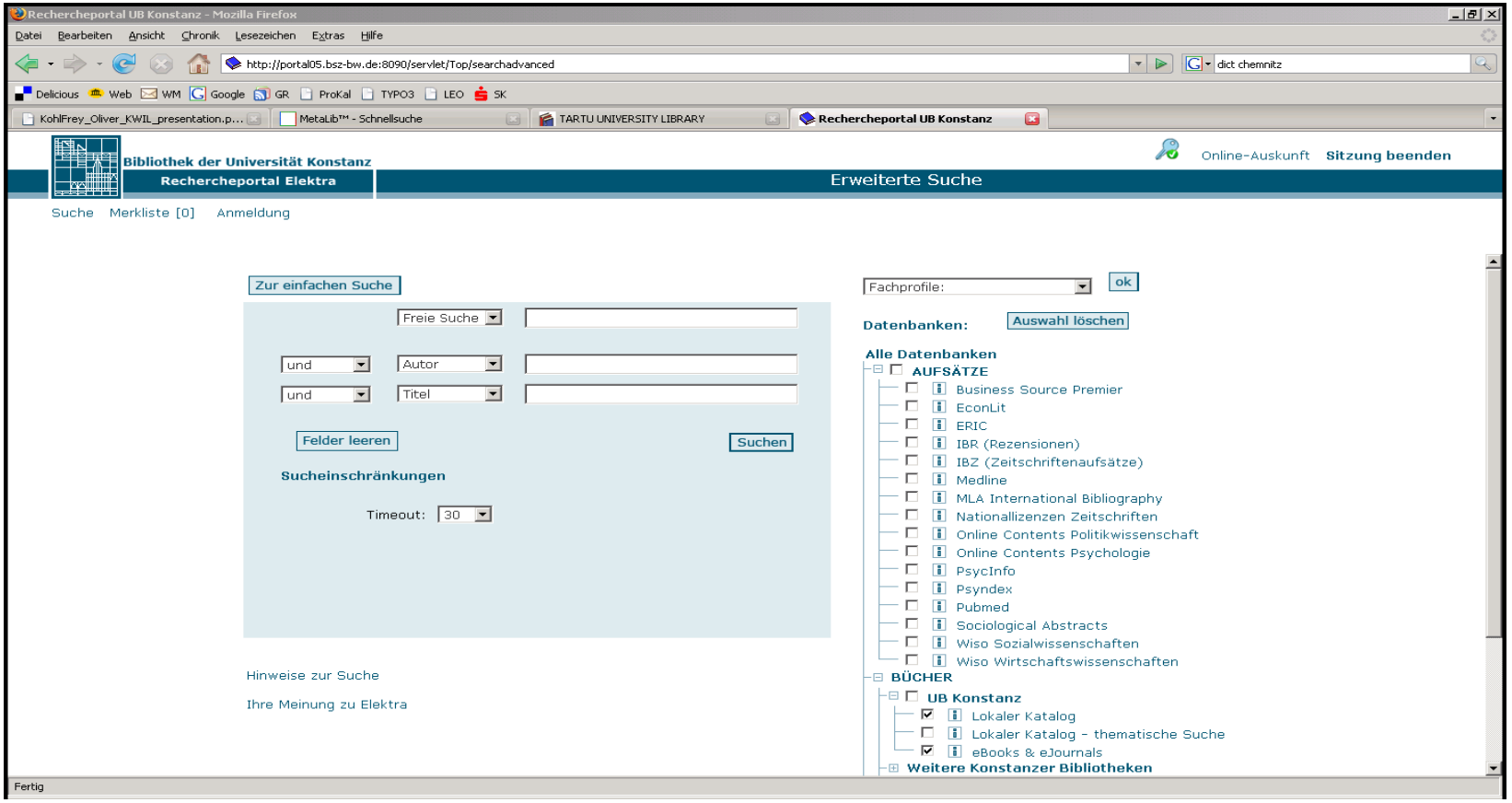
# Konstanz: Elektra (Advanced search)



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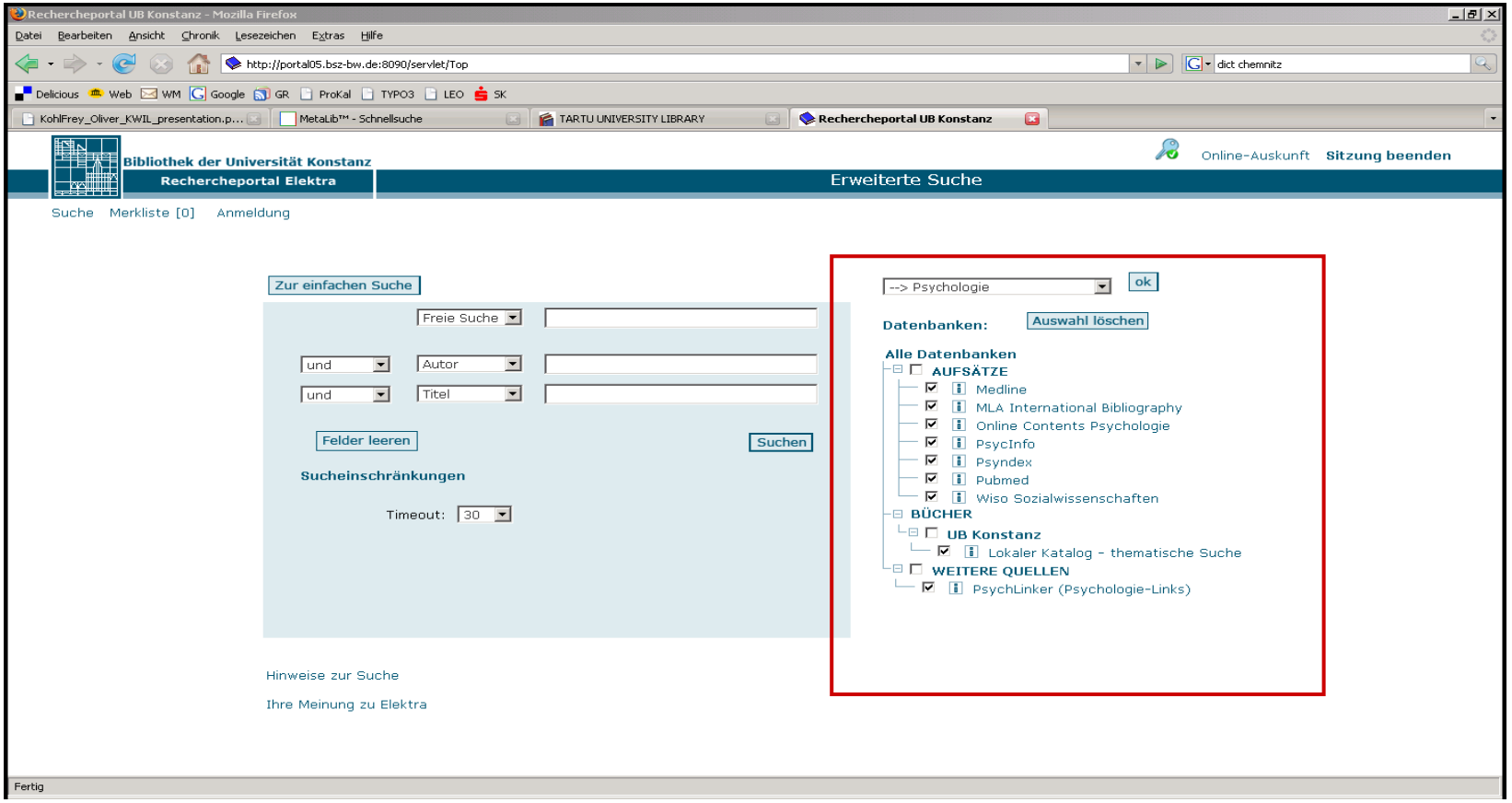
# Konstanz: Elektra (Subject search)



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# Good experiences with federated search

- ✓ One user interface, quite easy to handle (user)
- ✓ Search within different target sources (catalogues, databases, internet guides…)
- ✓ Huge amount of results

- ✓ Lot of work since 2005…

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# Problems with federated search

- Limited integration of targets (z39.50 or http protocol, problems of licencing, e.g. parallel access)
- High effort to synchronize standards of targets, e.g. Boolean operators (and we feel responsible)
- Long response times
- Often: No response (reliability)
- Sources not under library control (e.g. with http)
- Lots of results (no deduplication right now)
- No killer application…

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# Model A: eBook database

Situation at the University of Konstanz:

- Locally purchased lots of eBook packages (Springer, Oxford…) for special needs (some thousands).
  We could have managed to bring them into the OPAC, but:
- German-wide purchase of full text packages (e.g. Early English books online, half a million data sets) for all libraries = „national licences"
  - Need? Contrast to normal acquisition
  - Importance (500.000 vs. 2 million catalogue entries)
  - Changing packages
  - Bad bibliographic data quality

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# Possible solutions

1. Integration of original data as a target in Elektra
2. Integration of data in the normal catalogue
1. Separate eBook database with the Libero library software
   - Faster response time
   - Familiar search interface
   - Certain standardization of the data
   - Idea: to use external data wherever possible

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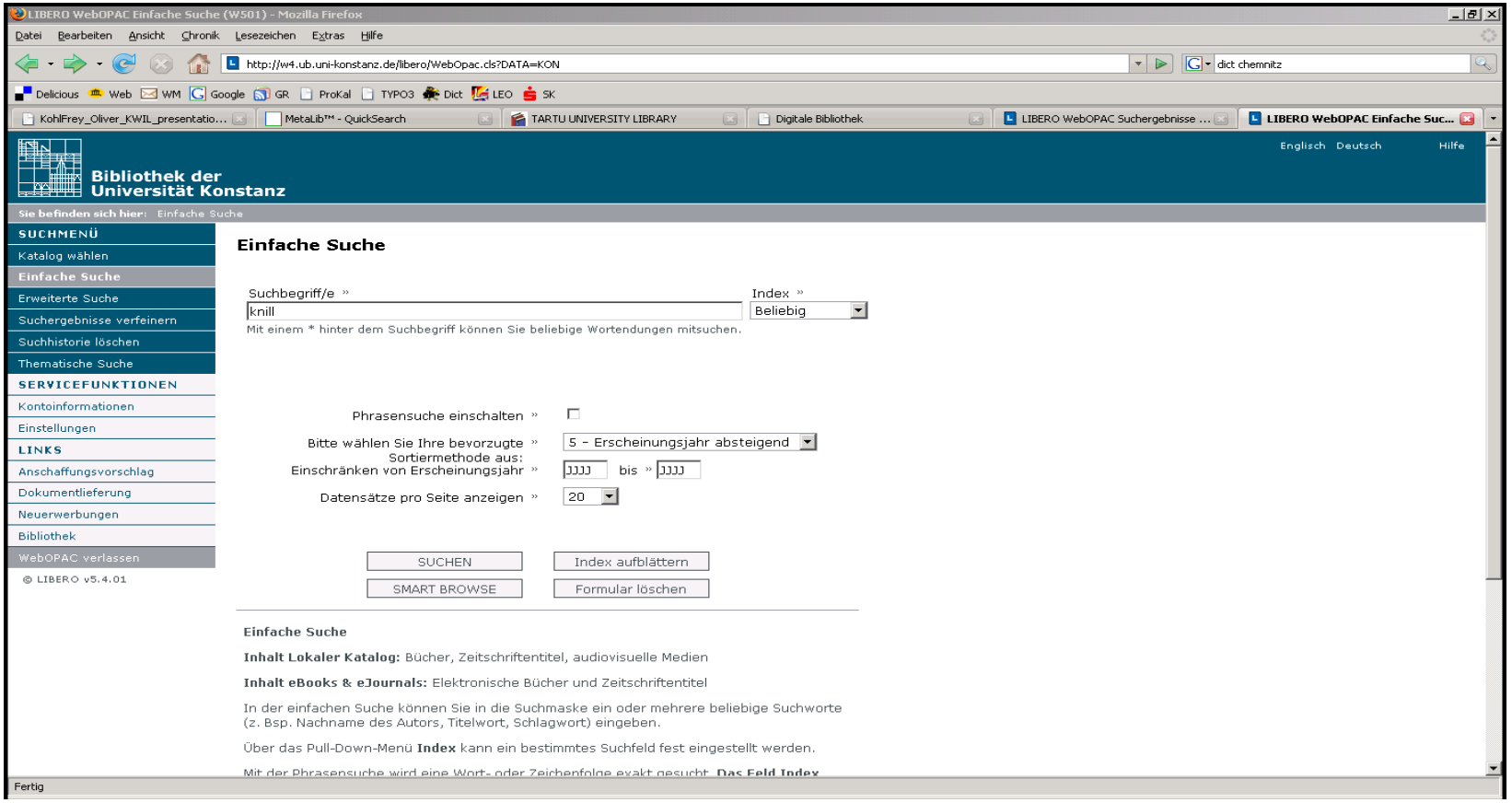
# Normal catalogue search



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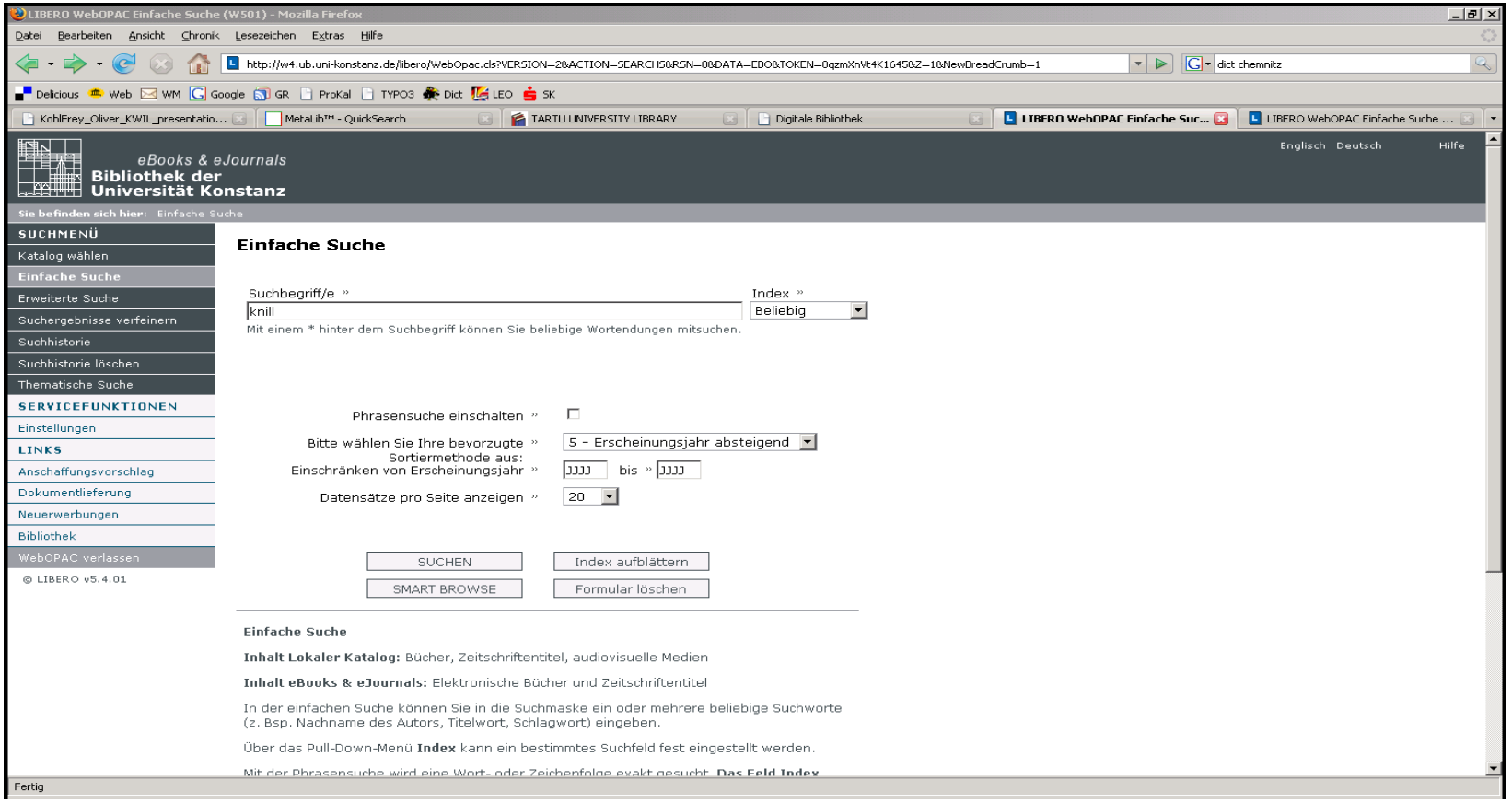
# eBook & eJournals catalogue



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# Further advantages and problems

- ✓ Data under library control: new loading of the data if necessary

- 2 databases
- Not complete: Even within the eBook database some packages are not avalailable (no external data available or for other reasons)
- No portal search possibility
- Insufficient data quality
- Interim solution!

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# The optimal search (again)

- Easy to use
- Different search options for novice and expert users
- All content (all subjects, books, journals, papers…)
- Getting fast sufficient and reliable results
- Completeness?
- Full text check
- State of the art Catalogue 2.0 features
- …

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# New technology: Primo and more

- Primo (ExLibris)
  - „a single interface for finding all the information they need“
  - Lucene search engine technology (open source)
  - Built up one index from different sources and search within that index

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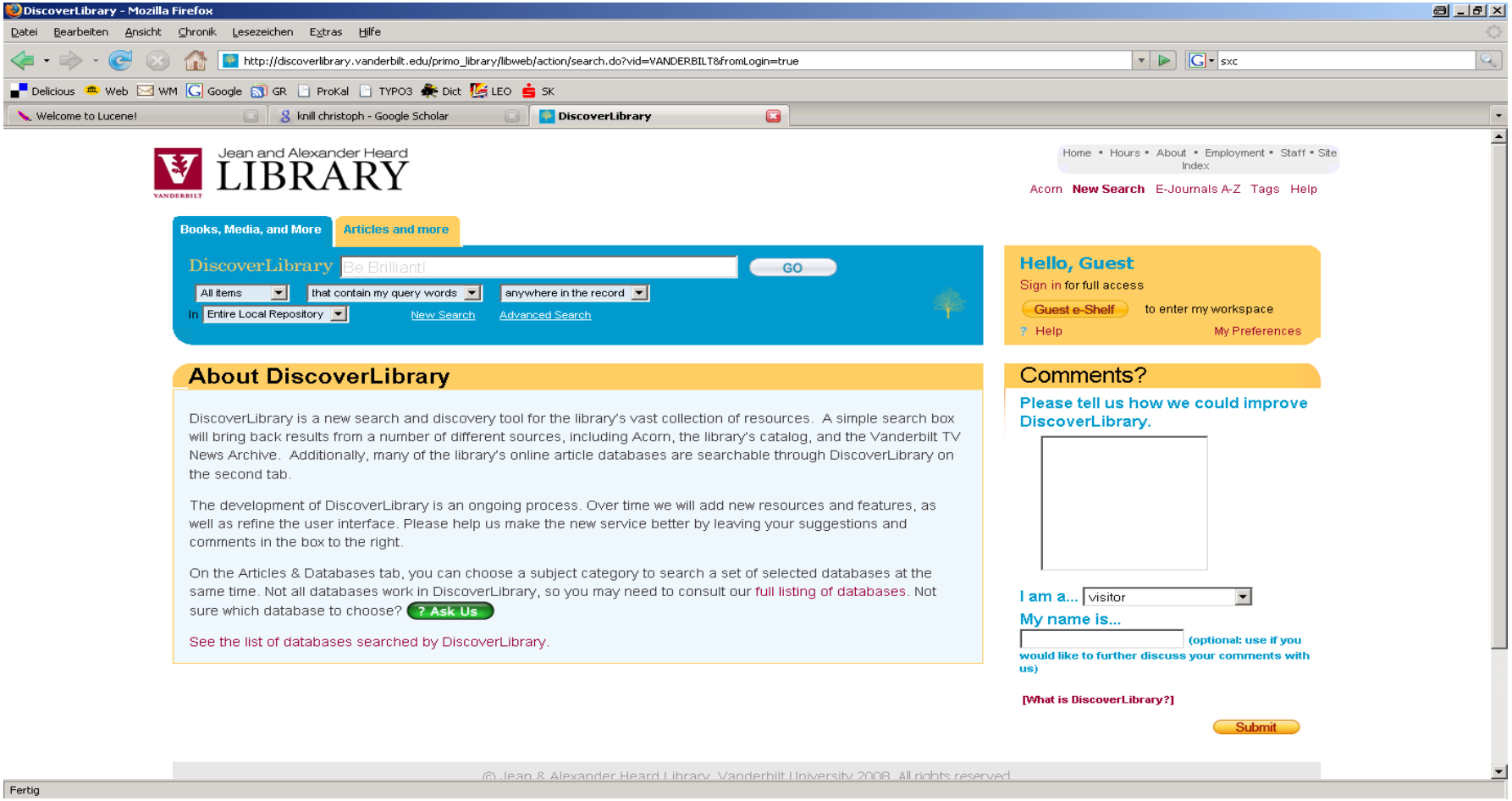
# Vanderbilt, Oxford, ETH...



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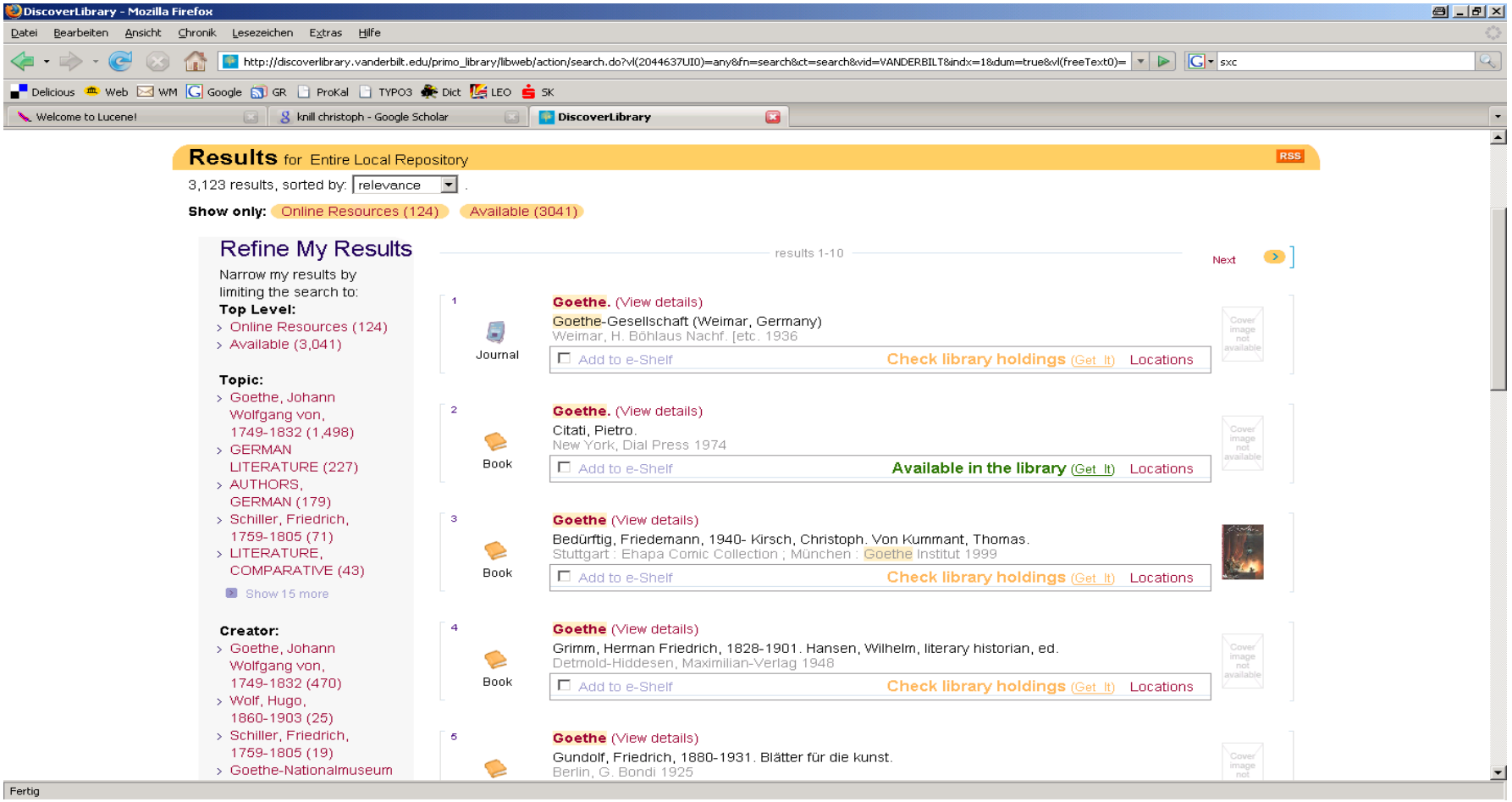
# Results



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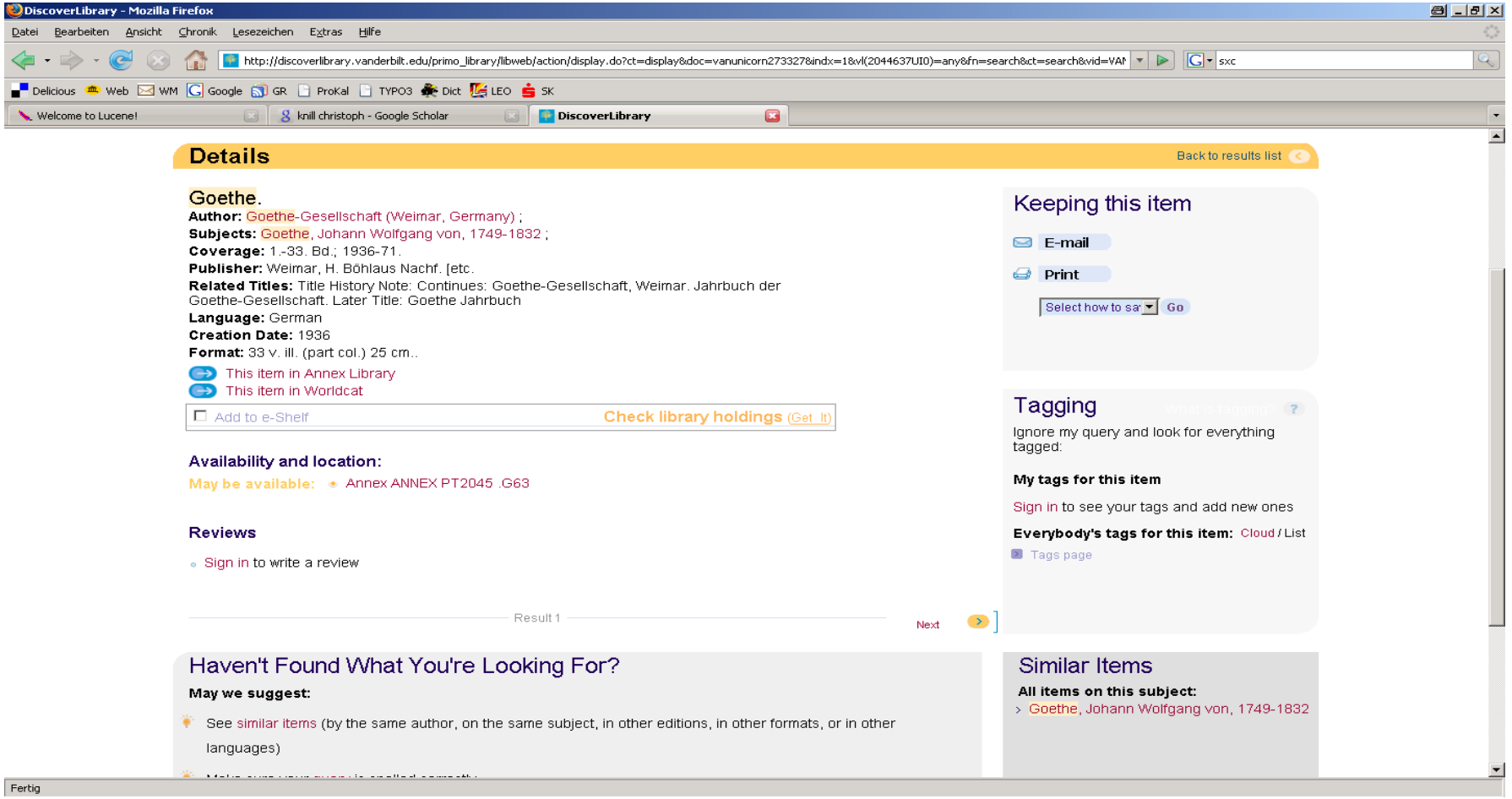
# Detail



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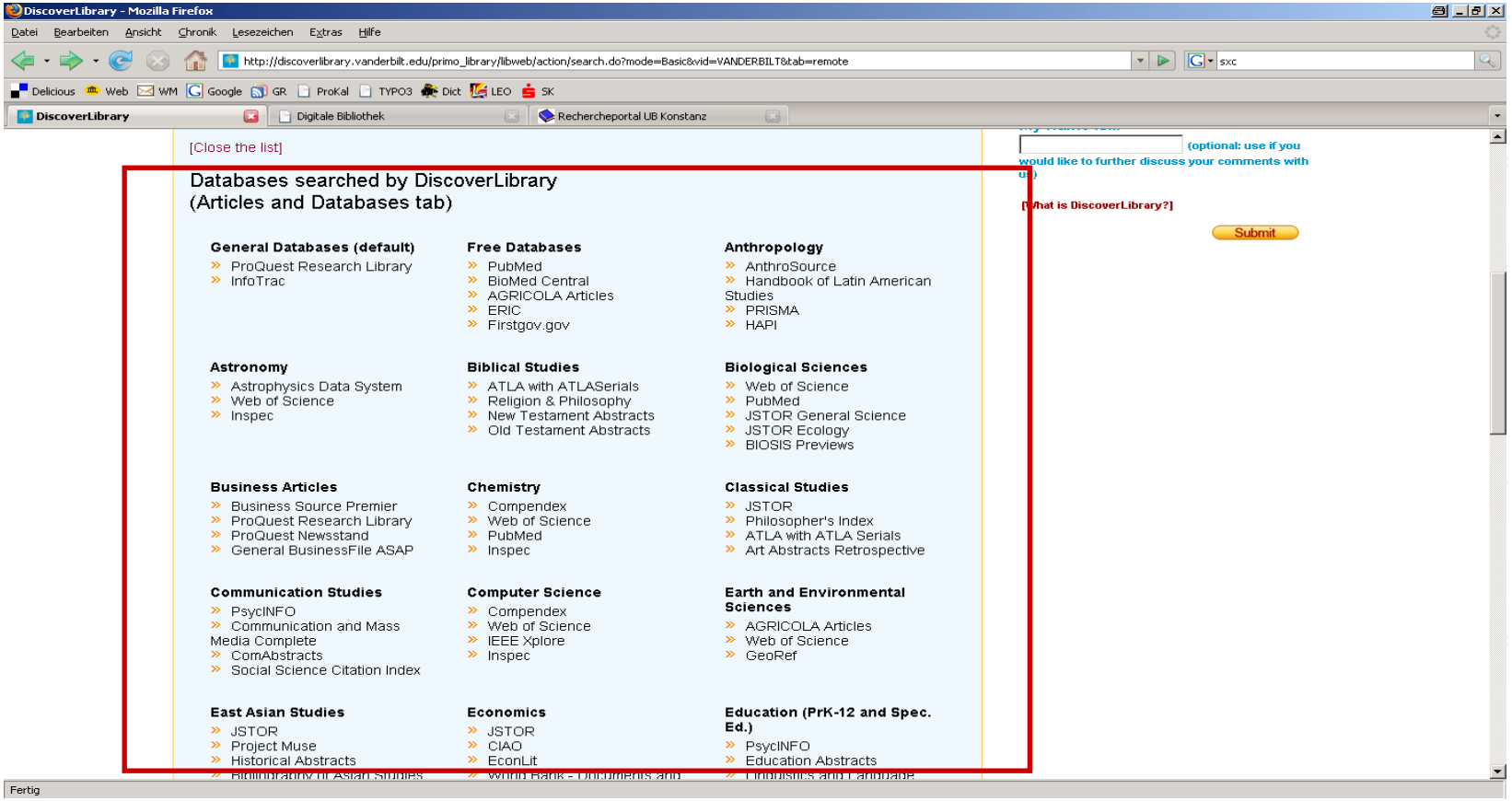
# Articles
# (probably through integrated Federated Search)



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# Primo: A star is born?

- ✓ Fast
- ✓ Easy to use
- ✓ Fits for all sources under library control (bibliographic units, repositories, picture collections, eLearning…)
- ✓ Reliability (one index from sources under library control)
- ✓ Deduplication / FRBRization
- ✓ Lots of Web2.0 features (drill down and more)

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# Primo: The reality

- ExLibris Price policy
- Works with data under library control, but:
  most of the important bibliographic databases are from external vendors ➔
  Index building is not possible!

Probably Primo is able to solve Model A (include decentral sources under library control), but obviously not Model B – a federated search tool is still necessary nearby.

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# The way out

- Optimize the federated search tool
  - Faster
  - More reliable
  - More sources („completeness")
  - More 2.0 features („should be like Google")

- And try to optimize library search tools with Primo or – more general - the Lucene technology?

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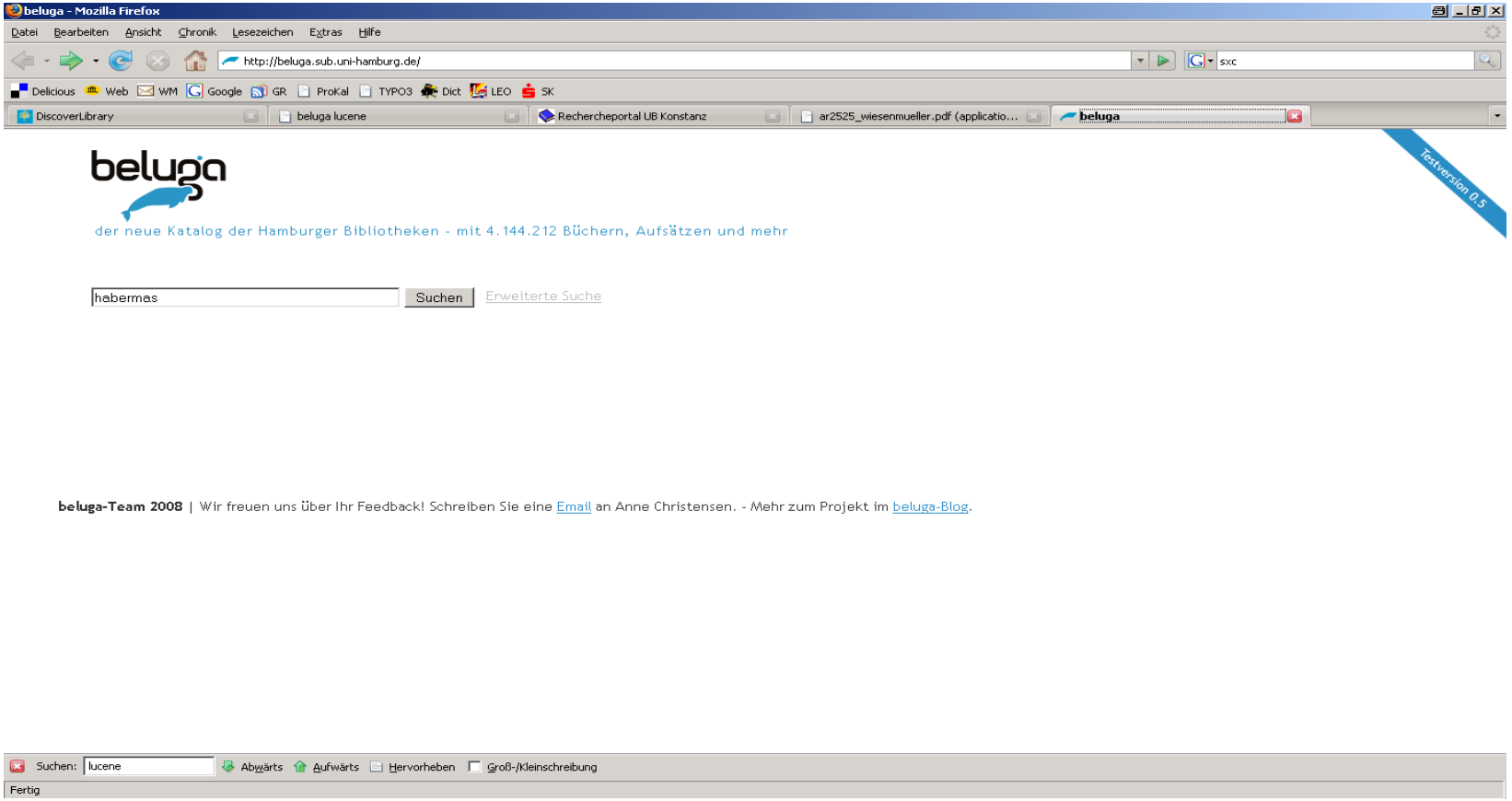
# Beluga (Hamburg) „Catalogue 2.0“ (with Lucene)



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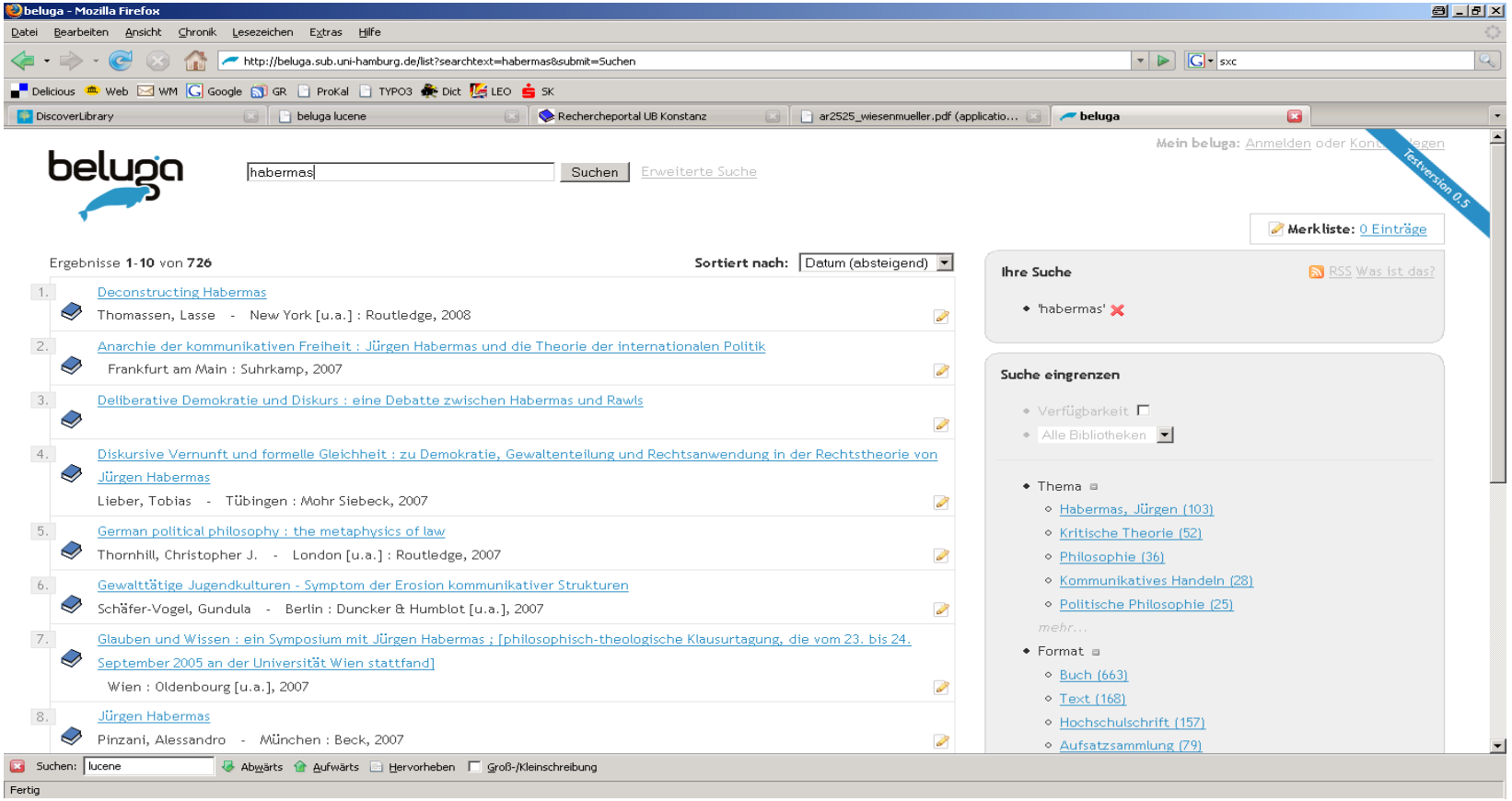
# Beluga: Results (Presentations)



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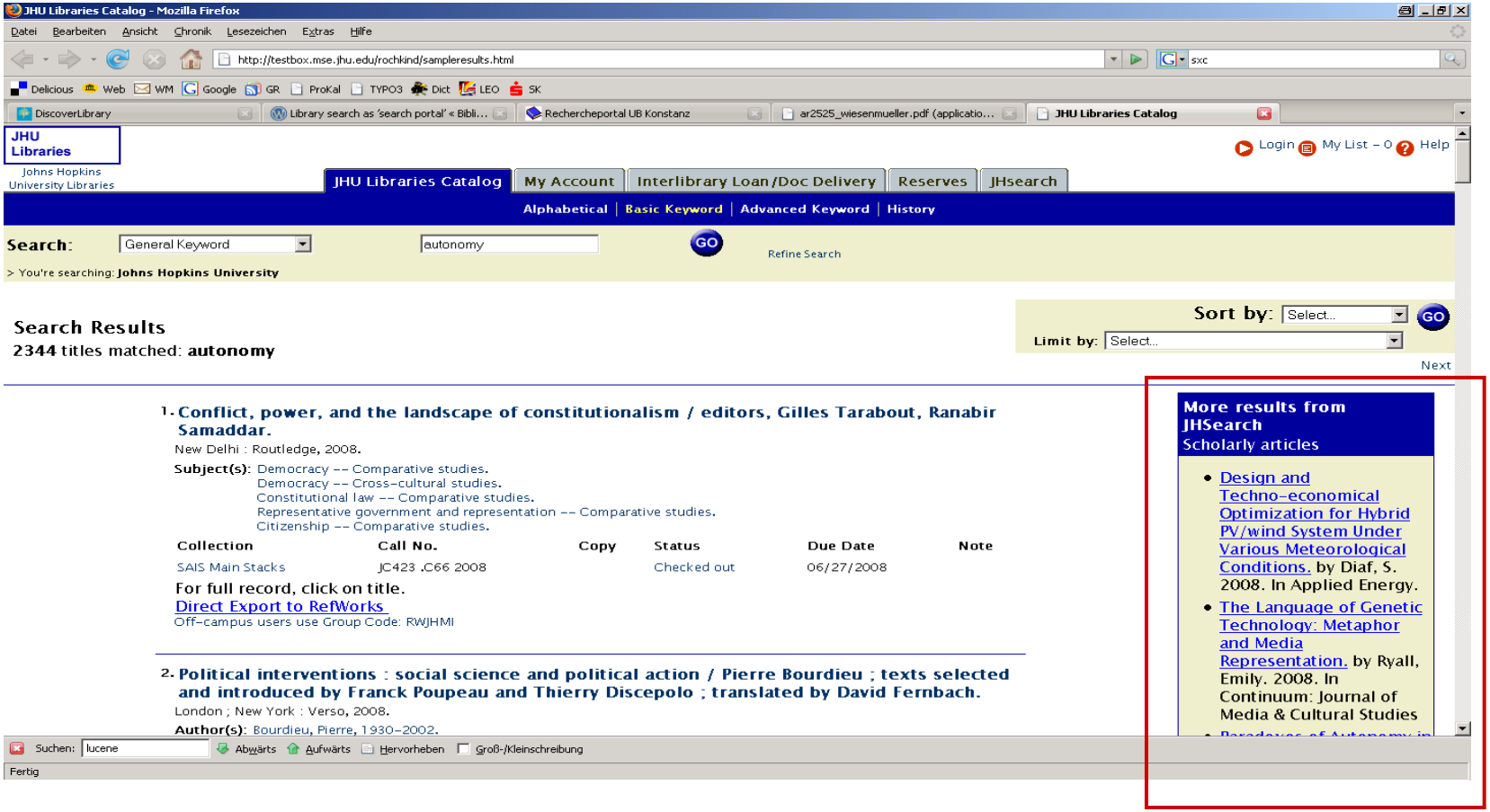
# Combination of Catalogue and result boxes from federated search (J. Rochkind, Johns Hopkins University)



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# Is it worth the effort?

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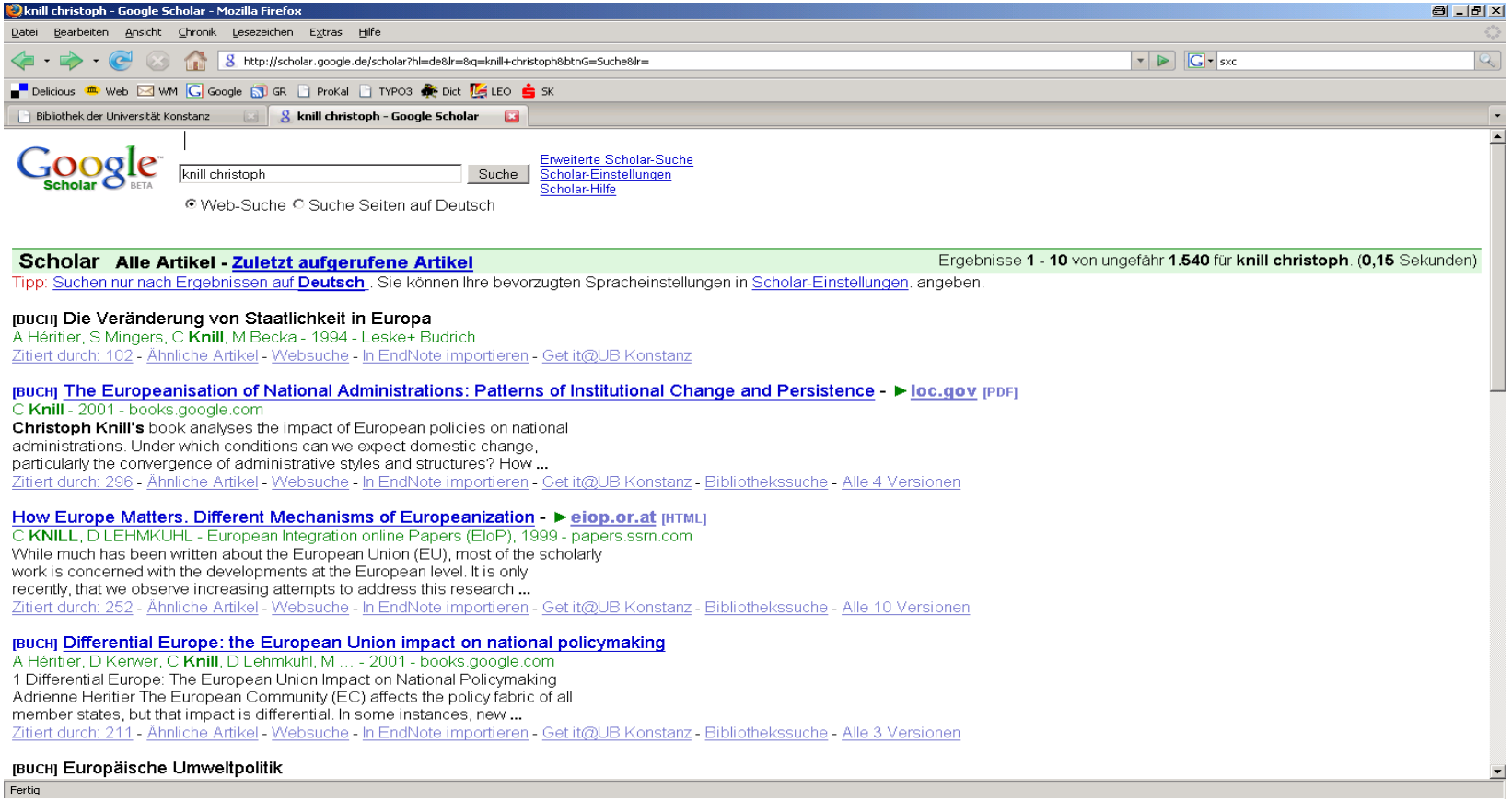
# Really?



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# Yes.

## Thank you.

www.ub.uni-konstanz.de/hilfe/kontakt/direktionabteilungen/personen/oliver-kohl-frey.html