A Checklist of Considerations for Selecting Metasearch Software

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These are some of the issues to consider when reviewing metasearch software applications.

Metasearch software: an application that performs simultaneous searching of two or more different types of resources and effectively presents results (e.g., merged, de-duped), with appropriate machine-level communication between related applications (e.g., authentication and authorization).

Local Considerations

- Can the product be easily configured and controlled for local needs?
- Is it compatible with your existing hardware and system software environment (e.g., platform and OS)?
- Is it compatible with your existing applications (e.g., shared authentication/authorization)?
- Will database license restrictions (e.g., simultaneous search limitations, limitations on remote searching) limit how you can deploy the service?
- Are there political/privacy/administrative issues (e.g., secure data vs. PATRIOT Act) you must consider?

Application Considerations

- Which search protocols does the product support (e.g., Z39.50, APIs, screen scraping)?
- Does the product have OpenURL support?
- Does the product offer an API (application program interface, which enables a greater degree of flexibility and interoperability)?
- What methods of user authentication are supported? Are guests able to access open resources?
- How much control do you have over tailoring interfaces for particular audiences or needs? Is it possible to specify different search parameters for the same search target for different purposes? Can results be ranked differently according to audience or purpose?
- Is it possible to have different database names and descriptions in different presentations/instances?
- Is it possible put a search box on another web site (e.g., integration with courseware applications such as WebCT, BlackBoard) that searches a specific set of resources?
- How can results be handled by the system and/or manipulated by the user? Are results deduplicated, merged, and ranked? Can the user sort, limit, or group search results?

Interface Considerations

- How easy is it to alter the interface? Which changes to the interface must be replicated upon software upgrades?
- Does the system follow W3C guidelines for accessibility?
- What personalization options (e.g., self-configured metasearch) does the system provide for?
- Can users save and export (e.g., e-mail, save as…) search results?
- What other features does it offer (e.g., spell checking)?

Management Tools

- What management tools does the product offer (e.g., statistics, configuration of error reports, resource configuration options, etc.)?

Consortial Support

- Global vs. local variables – can local installations alter the variables they need to change (e.g., help descriptions, error messages)
- Ease of local branding and configuration -- can individual local institutions have a high degree of control? (see Instance Configuration above)
- Ability to have local-only targets

Capacity and/or Hardware requirements

Interoperability with other, related applications (e.g., ILL, ILS, Virtual Reference software, tools for focused crawling of web sites, harvesting from OAI-compliant repositories, etc.)

Vendor Considerations

Note: Not all of these considerations will apply if an open source application is selected.

- Implementation Costs (in staff and money)
- Maintenance Costs (in staff and money)
- Roadmap or strategic vision, especially regarding support for standards and interoperability
- Product Support:
    - Frequency of revisions/updates to software
    - Maintenance of resource configuration packages (especially speed of response to outages)

Selection Process Tips:

- Require vendors to demonstrate support of functionality claims
- Call the vendor's help line and test response time
- Vendor documentation should understandable, thorough, and regularly updated. If the documentation is not searchable, the index should be comprehensive and effective
- Contact existing customers, particularly those not offered as references