in nature, the project managers have benefited from the collaborative nature of the project. Working together, the managers and their staff have developed an open and regular communication channel among the participants. They have traded tips and hints on technical challenges and have served as resources for others. For the information technology (IT) staff, this project has provided a unique testbed environment where they are able to work with their peers on cutting-edge technology. The participants have had an opportunity to experiment with metasearching technology and contribute to the national discussions about metasearching.

This brief summary highlights only a few of the key elements of the Scholars Portal Project. The participants are posting regular status reports and updates on the Scholars Portal Project page. In addition, the ARL Portal Applications Working Group’s survey report, *The Current Status of Portal Applications in ARL Libraries: ARL Portal Applications Working Group Final Report*, includes additional details on specific participants.

---

**PORTALS IN LIBRARIES**

**The Scholars Portal Project: The USC Perspective**

by Marianne Afifi

The Scholars Portal Project was launched in May 2002 as a multiyear collaboration between seven ARL member libraries and Fretwell-Downing. The project seeks to provide software tools for an academic community to have a single point of access on the Web to find high-quality information resources and, to the greatest extent possible, deliver the information and related services directly to the user's desktop. The impetus for the project was an article entitled "The Case for Creating a Scholars Portal to the Web: A White Paper" written by Jerry D. Campbell, dean, university librarian, and CIO at the University of Southern California (USC), and a discussion at an ARL meeting with the subsequent formation of the Scholars Portal Working Group. The project seeks to develop a metasearch technology within the context of a portal in conjunction with the vendor Fretwell-Downing, Inc. (FD). Each institution is to implement this portal within the context of its library website. The project is slated to run until 2005.

As a member of the USC project team and a frequent representative on the Project Managers group, I believe I have a good perspective on the essential aspects of this effort and can summarize USC’s experiences in several specific areas of the project.

**Project Team**

USC formed a project team that underwent some changes mid-stream due to realignment of departments and project groups. The current project team consists of the co-project managers and the technical manager in addition to an electronic acquisitions specialist, an electronic resources librarian, an instruction coordinator, a reference coordinator and an evaluation coordinator. Although the team members have very limited time allocated to the project, the team meetings and email communications have been valuable and have allowed us to move forward with the project and to consider it in context of how it may fit into the digital library environment.

**Managed Services Contract**

In addition to the project development costs, full participation in the project required the purchase of hardware and at least an FTE of technical staff dedicated to the project. In contrast to the other participants, some of whom had external funding for the project, USC did not have the internal resources to bring the Scholars Portal software in-house. USC performed a cost analysis and concluded that a managed services contract was a more effective solution for hosting the project. Such an arrangement means that the software is housed on FD servers and that there is a test environment and a production environment that USC can manipulate remotely. Initially, the managed services agreement proved to be new ground for FD, but eventually a system was agreed upon that allowed USC to work fairly independently using scripts. There
are still some glitches concerning support issues to be worked out, but the managed services agreement has saved USC equipment and staff time in addition to providing flexibility in terms of continuation of the project after the three-year pilot phase.

Authentication

Each of the participating institutions had different requirements for the portal in the context of their library’s technical infrastructure. For example, each site had a different way of authenticating users to their resources and thus a custom implementation had to be found for each institution. USC was interested in developing Shibboleth-based access control as part of a campus-wide effort involving a global directory infrastructure. Shibboleth was not one of the access control mechanisms FD had intended to implement. Also at the beginning of the project, Shibboleth was still in beta and there was a risk involved in developing to this software. However, after Version 1 of Shibboleth was released, FD was more confident about its stability, and USC signed a separate contract with FD to develop Shibboleth access controls for USC’s Scholars Portal implementation. While I cannot describe Shibboleth here (see http://shibboleth.internet2.edu/ for more information), the implementation at USC has been completed and is working.

Evaluation

Several institutions have performed assessment of the project implementation at their sites. USC contracted with an outside vendor, the Arthur Group, Inc., to perform a usability analysis and evaluation of the product in a controlled environment. Users (in this case students) found the concept of a single search very desirable and were willing to try the software again despite the problems they encountered with the functional and systems design, the interface, and how the portal met their expectations. However, the results were more favorable than expected given these difficulties.

The results of the evaluation will play an important role in further improving the implementation at USC, but should also be constructive for FD and the other project participants. While the main focus at USC was on the end-user evaluation, USC staff in its work with the portal back-end concluded that the staff interface is complex, has a steep learning curve and is thus resource-intensive. Further evaluation is planned at the conclusion of the project.

Conclusions

Although the three-year project is in its second year, progress has been very slow at USC. Some problems are common to all participants, such as delays in the establishment of the administrative project structure and the vendor’s software development, which is a year behind schedule. USC’s reasons for the slow progress are as follows: internal resource allocation; delays due to the time lag inherent in the managed services contract; getting the Shibboleth authentication to work; not releasing the software to the public due to the authentication development time; and wanting to perform a user evaluation study in a controlled environment. USC expects to have a functional version of the software available to the USC community by the beginning of 2005.

More details about the project, including participants, project reports and other documents, are available on the ARL website at www.arl.org/access/scholarsportal/index.html.

I would like to credit all project participants both at USC and at the other institutions for their tireless work, encouragement and direction.

PORTALS IN LIBRARIES
Assessment and Outcomes

by Amos A. Lakos

Amos A. Lakos is librarian, Rosenfeld Management Library, Anderson School of Management, UCLA. He can be reached at aalakos@library.ucla.edu

This paper highlights the importance of assessment in a portal framework and examines some of the outcomes and impacts of some existing portals.

Portals provide both a challenge and an opportunity for ongoing assessment. To ensure that a portal is successful we need to think about creating an assessment framework that will track system activities and the portal’s impact on customers, stakeholders and staff.

The following are the key principles that should govern any portal rollout:

- Simplicity – users want a simple and clear Web environment.
- Dependability – the site and its content should be available always, and it should be predictable.
- Quantifiable Value – users should feel self-sufficient and realize added value from using the portal.