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A First in Africa: Implementation of Metalib and SFX at the Cape Technikon Library



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Abstract

The Cape Technikon was the first member of the CALICO consortium of five academic libraries in the Western Cape, South Africa to implement Metalib and SFX technology.

Metalib is a library portal that enables users to search multiple database sources simultaneously, while SFX provides “context-sensitive” linking. This article examines local technical and staffing issues, managing the implementation process using the traditional African principles of ubuntu and batho pele (putting “people first”), and the marketing campaign leading to the final launch of the product.

The use of questionnaires at various stages of the implementation process to evaluate users’ opinions and input is described with relevant results displayed.

Introduction

ICT in context

Information and communication technology (ICT) is not optimally developed in Africa, and a gap exists between potential and reality in this field. Although online connectivity is increasingly available on the continent, even in the more remote areas, financial restrictions, poor telecommunications, and infrastructure failures hamper the full realization of an exciting potential.

South Africa, a middle-income developing country, leads Africa in ICT capability by far. To illustrate this domination, one need only note that of an estimated 1,351,075 African internet subscribers in 2001, South Africa accounted for about 750,000. The country's National Research Foundation (NRF) has as a Focus Area the theme of "ICT and the information society in South Africa." The NRF recognizes that it is "the combination of ICT's, knowledge and communication, which are essential resources for social and economic development" (<http://www.nrf.ac.za/focusareas/ict>) Development of academic information delivery is crucial to this combinational matrix.

In the academic sector in South Africa, ICT's organizational structure is underpinned by the Tertiary Education Network (TENET) which was founded in August 2000 replacing the national academic and research network UNINET. TENET's brief is to secure IT and internet services for universities and technikons, including contract management and operational and other functions. A description of academic informational collaboration in South Africa, and the establishment of TENET, can be accessed on the organisation's website at <http://www.tenet.ac.za/Publications/ReflectionsOnCollaboration.pdf>.

Metilib and SFX

MetaLib is a software interface and library portal that provides access to all defined resources held or grouped by an instance. A one-stop solution is offered to the end-user with services ranging from the delivery of full text articles to personalised options to save popular resources. The MetaLib search engine—the Universal Gateway—developed by Ex Libris, is used to connect the requester to their specific targets. MetaLib employs and supports industry standards for open architecture, MARC, OpenURL, Z39.50, XML and UNICODE.

MetaLib uses an X-server to execute and accept requests and functions such as authentication from an external source using the HTTP 'post' method. The HTTP protocol defines the formatting and transmission of, and is used to transfer, documents on the WWW. It defines the responses and actions of the web servers and browsers.

MetaLib executes external requests by also searching XML Gateways, another communication function used for web services in which XML documents are transferred.

MetaLib can support any record type and format, e.g. XML and USMARC, but the best way to display non-MARC and some specific data formats would be in its native interface.

SFX, a context-sensitive linking software product, utilizes the concept of the OpenURL via a link server to offer a list of services. The services rendered are dependent on the subscriptions and searchable databases on offer, and span the range from full-text linking, listings of holdings, abstracts and the ability to capture a citation. SFX services could be presented via MetaLib, or else if enabled, a link to the native interface of the SFX-enabled resources. The native interface is the front end of a specific resource as defined and presented by its vendor.

OpenURL is a protocol developed by Herbert van de Sompel in 1998, which builds pointers to services developed from the metadata of identified resources. This represents a link from the requester to the resource. The response from the service provider or holder of said information is dependent on whether the resource is OpenURL-enabled or the linking mechanism of these resources.

Z39.50 is the ANSI/NISO (ISO 23950) information retrieval protocol standard, which defines the specifications for information searching and retrieval between the computers from different information retrieval systems without any prior knowledge of the syntax and strategies needed on the foreign machine.

Background—CALICO, A Consortial Approach

A short history

The Cape Library Cooperative (CALICO) is made up of the five academic institutions in the Western Cape in South Africa: three universities (Stellenbosch University, University of Cape Town, University of the Western Cape) and two technikons (Cape Technikon and Peninsula Technikon). The two technikons are in a merging process to form a new institution, The Cape Peninsula University of Technology. The process is expected to be complete by 2005. The consortium is part of the Cape Higher Education Consortium (CHEC), previously the Adamastor Trust.

Funding by the Andrew W. Mellon Foundation gave birth to CALICO. The main vision of CALICO was to decrease duplication of materials over the five institutions, increase access to the materials in the various collections by using a common system and to

improve user access. To support this vision, the Aleph500 library system from ExLibris was implemented in the CALICO libraries in 1999/2000. The Cape Technikon was the first CALICO library to implement Aleph500 in 1999.

After the implementation of Aleph 500, the introduction of ExLibris' Metalib and SFX products was a logical progression, and in line with CALICO's consortial vision. Discussions to purchase the products started in mid-2001.

CALICO project plan

The Andrew W. Mellon Foundation assisted CALICO by making the funds available for the purchase of the two products, SFX and Metalib, that were bought in 2002. However, some financial assistance was still needed and it was only with the support of Emerald Publishing (U.K.), that CALICO could finally purchase the server. The server was set up in January 2003 and the software installed.

Training of core staff from each institution by ExLibris took place in March (SFX) and April 2003 (Metalib). Only two staff members from each institution received formal training, while others were allowed to attend as observers. The CALICO and Avioniss systems librarians (local support office) were trained simultaneously which impacted on the initial depth of knowledge needed for local support.

According to the CALICO project plan, the switch to production date for Metalib was set as 28 July 2003.

The Cape Technikon: a short description

The Cape Technikon is situated in Cape Town, South Africa. There are four branch libraries, with the Main Library situated in Cape Town. All technical services are located at the Main Library. The Library has a total of 58 permanent staff members (of which 15 are situated at the branch libraries) and provides resources, information and literacy programs to all Technikon staff and students.

To date, 15,592 students have enrolled for the 2003 academic year—approximately 2,100 more than the previous year, and almost 3 300 more than in 2001 (Bulletin. May 2003). The Technikon has 808 staff members.

Courses offered include bridging courses, diploma, degree and postgraduate courses. Although most students attend classes during the day, a number of courses are given in the evenings and some are available as distance learning via our e-learning initiative.

African Spirit - The Concepts of *Ubuntu* and *Batho Pele*

The inclusiveness inherent in the concepts of *Ubuntu* and *Batho Pele* was a guiding principle during the implementation process. In its purest sense *Ubuntu* is a concept centered on a communal humanity, that “...I can only be a person through others” (Mbigi, 2000). In the organizational context this spirit would apply to issues of leadership, co-operation and empowerment, stressing teamwork, recognition and consultation.

Ubuntu is described in the South African Government White Paper on Welfare as the principle of caring for each other’s well-being in a spirit of mutual support. “Each individual’s humanity is ideally expressed through his or her relationship with others and theirs in turn through a recognition of the individual’s humanity. *Ubuntu* means that people are people through other people. It also acknowledges both the rights and the responsibilities of every citizen in promoting individual and societal well-being” (South African Government White Paper on Social Welfare. 1997).

While individual differences are recognized, the emphasis in *Ubuntu* falls on a communal individuality, as distinct from Western concepts of radical individualism. The Cape Technikon Library tries to adhere to the principles of *Ubuntu* as an operational value.

Batho Pele is one of the eight core values adopted by the Cape Technikon during 2001, underpinning all programs and services. A Sesotho concept that “places people first” (Bulletin. Jan 2002), *Batho Pele* is closely linked to the humanist philosophy of *Ubuntu*. The National Government itself has adopted *Batho Pele* as an initiative geared to improving public service delivery. The Department of Public Service and Administration has implemented eight service delivery principles based on *Batho Pele*:

- Regularly consult with customers
- Set service standards
- Increase access to services
- Ensure higher levels of courtesy
- Provide more and better information about service
- Increase openness and transparency about services
- Remedy failures and mistakes
- Give the best possible value for money

Both these philosophies should be viewed as guiding visions rather than accomplished fact, especially given present African reality. Nevertheless, the interwoven strands of both *Ubuntu* and *Batho Pele* encourage a people-driven management style at the Cape Technikon Library, and this was reflected in the system implementation process.

In practice, this meant:

- involving the faculty librarians in overview sessions during SFX and Metalib training
- demonstrating the system in its “raw” state to all user services staff
- using a questionnaire drawn up by the system and training librarians to measure staff responses to the look, feel and overall impression of the interface, and its functionality
- involving faculty librarians in selecting resources and resource categories forming the basis of Metalib
- involving user services staff to create the library displays
- involving all faculty and branch librarians in the training programme developed for introducing students and Technikon staff to Metalib

Situation at the Cape Technikon - Staffing & Resources

The first decision to be made with reference to the implementation of Metalib and SFX was to identify the staff needed for the project. This ideally would have included the following staff:

- Systems librarian
- Electronic Resources Librarian
- Cataloguer
- Faculty Librarian
- Training Librarian

The acquisition of Metalib and SFX came at a rather difficult time for the Cape Technikon. The institution had just been informed that it would be expected to merge with the Peninsula Technikon by the year 2005. Merger plans and financial constraints resulted in a number of limitations being placed on the Library, the main one being the freezing of posts. Key posts such as that of circulation librarian had been frozen and that of cataloguer would remain unfilled pending a decision in October 2003. The loss of a cataloguer was a major blow, creating a vacuum in the proposed Implementation Team.

In effect, a pool of ten functional-level librarians could be called on to assist with the project. The pool was comprised of a systems librarian, acquisitions librarian, training librarian, research information support librarian and six faculty/information librarians.

It was felt that the Library could not approach such an implementation without an electronic resources librarian. Someone with a good knowledge of electronic resources being purchased, who could assist with the project on a full-time basis, was needed.

After some consideration the Library was allowed to create a temporary post for an electronic resources librarian, but no new staff could be employed. This resulted in staff being shifted and the acquisitions librarian being seconded to the newly created post for a period of seven months while the head of the periodicals section was seconded to the post of acquisitions librarian. The new posts demanded a steep learning curve from the staff involved and delayed the start of the project, as the electronic resources librarian was split between two posts for a period of two to three months while training and offloading acquisitions work.

As there was no cataloguer to call on, the systems librarian undertook the cataloguing function. The result was an increased workload for the systems librarian and to a lesser extent the training and faculty librarians. For all members of the Team, the implementation of Metalib and SFX would become additional tasks to be added to their daily routine.

Roles foreseen for members of the Implementation Team:

Systems librarian (including cataloguing)

- project leader
- local liaison with CALICO systems librarian
- local systems setup
- web customization
- cataloguing and configuration of free resources on Metalib
- cataloguing of electronic resources
- 856 links
- holdings and clean-up projects
- testing
- marketing

Electronic resources librarian

- identify resources for Metalib and SFX
- activating targets and titles on SFX
- negotiation and communication with vendors re configuration
- configure and catalogue subscribed periodicals on Metalib
- complete documentation of the processes created and workflow followed
- maintain database user names and passwords for access
- conditions and license agreements

Faculty librarian

- coordinator of the faculty librarian team
- marketing & media
- testing
- input with regard to the visual and functional setup from a user perspective

Training librarian

- training of library staff and users
- developing training documentation
- marketing
- testing
- input with regard to the visual and functional setup from a user perspective

Due to the particular situation the Technikon Library found itself in at the time, the only way the implementation could be approached was as a condensed short-term project. Not only was the STP date set by CALICO in the near future, but the seconded posts could only run until October 2003. Implementing Metalib and SFX became top priority for the systems and electronic resources librarians for the duration of the project.

Finite number of e-resources

Luckily the Cape Technikon does not have a very large resource base. However, sudden growth over the last two years had dramatically increased the number of electronic resources. The ripple effect caused by the purchase of MetaLib and SFX resulted in more money being set aside for new e-resources.

Presently 23 activated SFX targets and 100 Metalib sources, of which 31 are searchable via Metalib, are available. These sources include our largest databases, catalogues of the CALICO libraries and a number of smaller resources identified by the faculty librarians as being essential for research in their subject areas.

Implementation Process

Project Plan

The Cape Technikon's project started in mid-2002 when CALICO first announced the purchase of MetaLib and SFX. Our goals were determined by CALICO's goal to STP Metalib and SFX by the end of July and were to:

- involve and get staff to “buy into” the project which would not be successful without staff approval
- provide better access to Cape Technikon’s e-resources for the user community
- clean up the existing catalogue records for e-resources (856 field)

We realized that we would experience difficulties due to our current way of dealing with electronic links. We had only recently started using the 856 field to create links to online resources. Although we had a policy in place whereby our cataloguer would create links for any new titles, the linking of existing titles was being done on demand by either the systems librarian or the acquisitions librarian. We had no idea of what was available in electronic format or whether or not links had been created, and saw in the purchase of SFX an ideal opportunity to clean up our existing data in preparation for implementation.

Timeline for implementation of SFX and Metalib

<i>Task</i>	<i>Period</i>
Purchase of Metalib by CALICO	mid-2002
Clean-up of periodical titles with electronic access	Oct-Dec 2002
Setup of server and installation of software	Jan/Feb 2003
SFX training	Mar 2003
Activate aggregators and titles on SFX	Mar/Apr 2003
Metalib training	Apr 2003
Define categories and resources	May/June 2003
Cataloguing and configuration of resources	May-July 2003
Updating of local tables and web customization	May-Jul 2003
Marketing campaign	Jul 2003
Staff training	Jul 2003
Launch	05 Aug 2003
User training	Aug 2003

The catalogue clean-up project consisted of two parts, each involving various steps:

Part 1.

- Printing a list of all periodical records containing 856 fields
- Involving faculty librarians to test 856 links (URLs) for periodicals in their subject areas and to record the local holdings of the titles.
- Correcting 856 links and local holdings by systems librarian

Part 2.

- Faculty librarians checked the electronic access of all periodical records without 856 fields. URL's and local holdings were recorded.
- Catalogue records were updated to include URLs and correct local holdings

Simultaneously, the periodicals list, published online and in printed form was updated with title changes, electronic links and correct dates.

This mini-project was completed by December 2002 and took a period of three months.

The project plan for the implementation started with SFX training in March.

Staff involved

Systems librarian (SL)

Electronic resources librarian (ERL)

Training librarian (TL)

Faculty librarian (FL)

Below is a brief outline of the project plan for implementation.

Project plan - Metalib, SFX

<i>Task</i>	<i>Staff members involved</i>
SFX training	SL, ERL, TL, FL
Activate Aggregators	ERL
Metalib training	SL, ERL, TL, FL

Define categories and types of resources to be added to each category	SL, ERL, FL
Contact resource hosts for server port	ERL
Develop questionnaire for staff	TL, SL
Catalogue each resource for local usage	ERL, SL
Test access	ERL, SL, FL
Identify other resources not yet on Metalib	FL
Develop user guide/manual for SFX/Metalib	TL, SL
Include resources not yet on Metalib	ERL, SL
Test access	ERL, SL, FL
SFX updating and testing	ERL, SL, FL
Set up user access	SL
Link to Aleph for authorization	SL
Introduction to SFX and Metalib for library staff	TL
Questionnaire completed	All staff
Results tabulated	TL
Update web pages for SFX	SL
Upload SFX titles into Metalib e-journals	SL
Customize web pages for Metalib	SL
Staff training (Library)	TL, SL
Launch of SFX and Metalib	Team + Library Management
Staff training (Lecturers and Admin)	TL
Student training (All)	TL, FL

The most difficult part of the project (other than technical issues) was determining our list of resource categories and allocating resources to each category. We tried to involve our faculty librarians as they have a good knowledge of the content of our databases.

We asked them to list the resources they use and allocate a resource category to each. However, we ended up with a lot of duplication and too large a number of categories to be practical. The systems and electronic resources librarians had to edit the list of categories, combining overlapping subject areas and removing or adding categories as appropriate (e.g. no faculty librarian had indicated Information Technology as a possible category, even though we had resources specific to the subject, while another librarian created a number of categories all using the same resources, e.g. retail management, personnel management, etc.).

Very aware of the importance of involving staff and making the project a Library success story, we created opportunities for involving as many staff as possible. The first opportunity was involving the faculty librarians in determining resource categories and the second was to allow them input into the “look and feel” of Metalib. At this point of the project we were still awaiting a decision by the CALICO Board as to whether or not Metalib would be a single interface for CALICO, or whether individual CALICO institutions would be able to customize the interface to suit their needs. We decided to be very conservative and use the default interface, with small adjustments, mainly functional.

In order to focus on the areas where we wanted comment, we drew up a short questionnaire. We invited all user services staff to attend one of two Metalib demonstration sessions. At these sessions we discussed and showed them the basic functionality of Metalib, drawing their attention to features on which we wanted feedback.

Questionnaire

Name: _____

Please make a tick where appropriate.

1. Is the **browse** function Useful Confusing

2. Do you need the **browse function**? Yes No

If yes, why?

3. Do you want the category list arranged ...

Alphabetically per subject

Alphabetically per faculty

4. Would you like the categories list to have a Drop-down menu Static menu

5. There are three ways of getting to your resources in Metalib. Which of these three, would you like to have available:

YES NO

Browse

Category List

Resource Locator

*If you have answered “Yes” to **Resource Locator** in Question 5, answer questions 6 & 7.*

6. Would you like to have a “Resource type” and a “Categories list” option available?

Yes

No

Please motivate:

7. Do we need the “Keyword” as well as the “Any word” search options?

Yes

No

If yes, why?

8. Do you think the “Quick Search” function is useful? (You can only have a maximum of three resources linked to it, which will be standard for all.)	Yes	No
---	-----	----

9. Would you prefer to see the Metalib homepage or the search screen when logging in?	Metalib homepage	Search screen
---	------------------	---------------

10. If you chose the “Metalib Homepage,” would you like an FAQ option?	Yes	No
--	-----	----

Please motivate your answer:

11. Would you like to see icons next to the resources, e.g. full text, free, available on and off campus, etc.?	Yes	No
---	-----	----

12. Should we keep the “search resources” and the “link to resources”	Mixed	Separate
--	-------	----------

13. Which of the items under the “My space” heading would you like to have available?

YES NO

My Resource list

My e-Journals

My e-Shelf

My Account

My History

My Alerts

Upon tabulating the results, we again noticed how people's views on the importance of certain functions differ. Answers received also indicated which areas they found confusing and we noted these for special attention in our staff training sessions.





Although we took all comments into consideration when customizing the Metalib screens, we did sometimes override the suggestions given. An example of this was that of the eight staff members who filled in the questionnaires, only two saw any value in the "browse" function. However, when the Implementation Team discussed the results, we reconsidered how users would possibly search for information and realized that this was a key function for the user who wanted to search a specific resource.

In many cases the votes were split, e.g. whether we first see the home or search page and whether or not we include a quick search option. In both of these cases, we maintained the default options.

However, in some cases the staff were very specific in their needs, e.g. all staff felt that using icons to indicate type of access next to the listed resource names was useful, that the resource locator function was not as useful as the other options, and that we did not want users to be able to adjust their account information. These suggestions were reflected in Metalib.

Other unsolicited comments received by staff at this time were that the information on the home page was too busy and that intensive training would be needed. We subsequently revised and simplified the home page information to suit our users, many of whom do not speak English as a first language.

Searching tips

- ☐ Choose your resource category, click ; or, browse the list of resources.
- ☐ Select your resources by clicking on the ☐ next to the resource name.
- ☐ Type in your keywords.
- ☐ Click on .
- ☐ Click on  to view your results.
- ☐ Selecting  will open online access to full-text articles, abstracts or table of contents if available.
- ☐ Use **FULL DETAILS** for bibliographic information, sometimes including abstracts or full text information.

The faculty librarians were also asked to contribute by suggesting any resources they would like to see available via Metalib. However, we asked them to provide us with as much information about the resources as possible as we did not feel we would have enough time to research the source before the launch date. We could not include many of the resources suggested, or could only create a link to the resource, due to the lack of information provided.

Outside influences

In May, the faculty librarian on the Implementation Team visited the United Kingdom on holiday. She saw this as an opportunity to visit the University of Westminster and the University of East Anglia whose libraries were involved with the implementation of Metalib and SFX. It was the first time any of our staff had visited libraries in Britain and we were greatly encouraged by their support and generous spirit. The greatest value gained from the visit, other than some exciting ideas, was the fact that these librarians were experiencing problems similar to our own. Their experiences enabled us to prepare ourselves for problematic situations, e.g. selecting resource categories.

In general, our staff has had very little exposure to libraries outside South Africa and it was encouraging to be able to get input from these libraries.

Policy decisions

The implementation of Metalib created a number of problems that involved policy level decisions.

The first question that arose was how to deal with individual periodical titles with electronic access. These would largely be cases where we purchase the title from an organization or committee who published privately. We would not want to create records on Metalib for each of these cases. We eventually decided to continue access to these journals via the library OPAC, using the 856 field to link to the journal electronically. We would also create an SFX object portfolio for the title and include it under the heading “Miscellaneous e-journals.” At the same time we made the decision that any periodical titles provided by a vendor set up as an SFX target would be controlled via SFX and we would remove the 856 fields from the catalogue records for these titles. A list of all titles remaining with 856 fields was printed and kept by the electronic resources librarian for checking and updating URLs.

Secondly, we had to consider whether we should continue to maintain our web page containing our listed databases and search links as well as Metalib. In our library we only have three staff members with HTML skills: our director, systems librarian and training librarian.

Considerations:

- We see Metalib as a “one-stop-shop” from where our users should be able to access all resources made available by the library.
- Some resources would not only be accessible, but searchable via Metalib which would be more effective than using the web page links.
- We do not have the staff to maintain two overlapping systems.
- Metalib would be available via the campus intranet and as a link from the library web site as well as via the Internet, whereas the library web site is only available via the campus intranet.
- We would have to maintain the library web pages that contain information to which there are links in Metalib, e.g. the virtual libraries created by the individual faculty librarians.

After due consideration, we made the following decisions:

- Only Metalib would be available to our users.
- Our library web “search page” would contain only a link to Metalib and a list of databases on trial.
- We would continue to maintain only those pages that would be accessed by Metalib.

Example of our “search” page on the library web site:

Library Services

Your innovative gateway to information

Search

Services

Help

About

Search Online Resources

Databases

(full text & abstract data sources)

[Metalib](#)

[OPAC catalogues \(ALEPH\)](#)

[Sabinet](#) includes:

National

- ISAP (Index to South African Periodicals)
- SA Cat (library material available in SA libraries)
- Current & completed research in SA
- UCTD (SA theses and dissertations)
- NAVTECH (current/completed research projects in SA Technikons)
- SUBSIDIE (lists of accredited journals for research subsidie)
- [SA Government Gazettes](#) (separate URL)
- [SA e-publications](#) (separate URL)

International

- World Almanac (full-text resource)
- FS WorldCat (42 million+ library catalogue records)

[EbscoHost](#) includes:

- Academic Search Premier
- Business Source Premier
- MasterFILE Premier
- Newspaper Source
- USP DI Volume II, Advice for the Patient
- Regional Business News
- Health Source: Nursing/Academic Edition
- MEDLINE
- ERIC (Educational)
- Health Source - Consumer Edition, etc.

[EbscoHost Free Resources](#) includes:

- Library Reference Center
- Teacher's Reference Center
- Book Discussion Guides
- Book Talks

[Emerald Fulltext](#)

[National Inquiry Services Centre \(NISC - Biblioline\)](#)

- AIDSearch (MEDLINE AIDS/HIV Subset, AIDSTRIALS & AIDSDRUGS)
- Child Abuse, Child Welfare & Adoption Database
- South African Studies

[SwetsWise](#)

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[Engineering Village 2](#)

[Springer](#)

[Science Direct Journals](#)

[Daai \(Design & Applied Arts Index\)](#)

[The American Society of Civil Engineers](#)

Other search services:

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[Nat. Acad. Press](#) (2000+ free books)

[Some 1500 Classics.](#)

Example of the resource on Metalib:

The screenshot displays the Metalib Search interface. On the left, there are two sections: 'RESOURCE CATEGORIES' with a 'Select Category' dropdown and a 'Go' button, and 'RESOURCE BROWSER' with an empty search box and a 'Go' button. The main area is titled 'MetaLib Search' and contains two identical search fields, each with a 'Field to search' dropdown set to 'All Fields' and a 'Type word or phrase' input. Below these are radio buttons for 'And', 'Or', and 'Not'. A 'Search' button and a 'Clear' button are at the bottom of the search section. Below the search section is a 'Browse Resource List' table. The table has columns for 'Resource Name' and 'Type'. It lists several resources, each with a checkbox, an information icon, and a 'FullText' label. The resources are: EBSCO Academic Search Premier (Index), EBSCO Business Source Premier (Index), EBSCO MasterFILE Premier (Index), Education Index (SP) (Index), eJournals: Custom 250 (Gale) (E-Journal), and Emerald Fulltext (Index). On the right side of the interface, there is a sidebar with links for 'My R', 'My e', 'Sessio', 'PA', and a list of actions: 'Inform resource', 'Add Resource', 'Resc', 'My Resou', 'Link', 'FullText', and 'Text'.

	Resource Name	Type
<input type="checkbox"/>	EBSCO Academic Search Premier FullText	Index
<input type="checkbox"/>	EBSCO Business Source Premier FullText	Index
<input type="checkbox"/>	EBSCO MasterFILE Premier FullText	Index
<input type="checkbox"/>	Education Index (SP)	Index
<input type="checkbox"/>	eJournals: Custom 250 (Gale) FullText	E-Journal
<input type="checkbox"/>	Emerald Fulltext FullText	Index

A further consideration was whether or not to allow our users to access the library OPAC directly or via Metalib. The decision was to provide both options to our users initially, but the more we worked on Metalib, the more indecisive we became. Arguments used were the amount of training that would have to take place over a very short period of time should we remove the OPAC access; and the opposing view that to familiarize our users with the new interface, the best way would be to remove access to the OPAC. Eventually a management decision was made that Metalib would be the only available interface, with the OPAC option remaining available for a week after the official launch of Metalib, to assist users who had not yet been trained and could not cope with the new interface. The main reason for the decision to use Metalib as the only interface, was that the catalogue would be available either by searching via Metalib or as a “link to” resource. Using the link, would be the same as using the OPAC without Metalib.

Problems Experienced

We came across a number of problems, some of which never occurred to us when originally planning the project. The configuration of cross-searching MetaLib resources and SFX settings that seemed relatively straightforward in the training sessions, proved to be extremely problematic once you were on your own. Due to the newness of the product and the timing of the training, we could not depend on a strong knowledge-base

existing at our local support office. To counteract the effects of this, a simple, age-old librarian's tool was called upon: the power of networking and personal contacts.

Many of the problems we initially experienced were quite small and easily fixed by support staff. But, as we worked on the system in more depth, we started coming across problems not so easily solved. With such a short time until the STP date, we knew we would not be able to solve all problems before the launch. It proved to be a very lengthy process to configure and test the MetaLib resources, whether modifying an existing database in the CKB (Central Knowledge Base) or adding a new one to the CKB.

A complication that had not been envisaged at the outset was the increased complexity associated with the Cape Technikon's decision to purchase a number of additional electronic products during the project. This added to the workload of the Electronic Resources Librarian, as her time was spent in deciding on new products, negotiating with vendors, and in discussion with the SASLI national office.

Local South African resources not in MetaLib's CKB and SFX created a new set of problems. Vendors were not familiar with MetaLib or SFX and this led to complicated and prolonged communication. There were huge differences from one vendor to another. We also discovered that MetaLib does not cater for the format in which our major supplier in South Africa stores data (BER) and ExLibris would have to create a new configuration for the data format.

Another problem was that the version of Aleph we are using does not interact well with MetaLib, even though we had loaded all the appropriate fixes. We wanted to authenticate our MetaLib users against our Aleph database. This would enable us to ensure that all registered MetaLib users were staff or students at our institution and would ensure that we remained within the license agreements we had with our vendors.

The usage statistics remained a concern as it proved difficult to get reliable figures. The conclusion reached was that parallel information would need to be kept: one from MetaLib and one from the individual resources. A resolution was needed as usage figures were an important part of motivating for the continued subscription to databases.

We had to decide whether or not to include the SFX option that was not working properly in our e-journals list. Unfortunately, our staff was aware of the possibility of SFX linking, but we did not want to build expectations that could not be met. We eventually decided to remove the option and use the e-journals as a list of available full-text journals only until such time the problem was solved.

One of the problems that we were very conscious of from the outset was that of the speed of our campus network and the necessary bandwidth to support the new demands.

Within the higher education (HE) sector the student and staff demands on ICT are becoming ever greater. Wu and Liu unequivocally state this need: “Libraries as the supporting backbone of higher education need to provide adequate bandwidth to handle the traffic in a timely manner.” (Wu and Liu 2001) Overseas libraries and their patrons tend to take this as an absolute given, but this is not the case in Africa. This then remains a future challenge for our librarians. We can see this clearly in the implementation at Boston College where “connectivity is expected and assumed, and resources are evaluated often on a basis of how easy they are to locate and use.” (Gerrity, Lyman, and Tallent 2002)

Marketing

When implementation plans were first discussed, it was decided that we would have a launch for Metalib and SFX for our Technikon community. We had previously quietly implemented new innovations, but decided that Metalib would be so beneficial to our users, that we would really like to make them aware of the product and its benefits. Of course, finance was a problem. We had no budget for a launch or marketing campaign.

We were challenged with providing a marketing plan that would cost as little as possible—and then try to convince the Library Management to find the funds. We tried a multi-tiered approach:

- Test groups
- Screensavers
- Posters
- Bookmarks
- Pamphlets explaining the search strategy on Metalib
- Article in the monthly staff bulletin
- Word of mouth advertising by faculty librarians during faculty visits
- Caps
- Library display
- Launch
- Coverage of the launch by the Technikon news team for the staff bulletin, including photographs
- Video of the launch ceremony

Test groups

To evaluate the user-friendliness of Metalib a test group of one lecturer from each faculty and 9 students was invited to work on Metalib without any training and was asked to complete a one-page questionnaire about their experience. The initial survey took place before any customization was done on the Metalib screens. The survey

would be repeated a few months after the launching of Metalib, when a comparison would be made between the two sets of answers.

User survey

Do you find Metalib user friendly?

	<i>Yes</i>	<i>No</i>	<i>Unsure</i>
Staff	4	4	0
Students	6	2	1

Did you get the desired result from your Metalib search?

	<i>Yes</i>	<i>No</i>	<i>Unsure</i>
Staff	3	4	1
Students	8	0	1

Would you need training to help you with searching on Metalib?

	<i>Yes</i>	<i>No</i>	<i>Unsure</i>
Staff	7	1	0
Students	6	3	0

What do you like about Metalib?

Staff 5 staff members remarked on the access provided

1 remarked on the colour scheme

2 commented on the number resources

Students 1 commented on the number of subject areas that could be searched

3 commented on the number of resources available

2 commented that it was clear and simple to use

2 mentioned navigating from one database to another

What do you dislike about Metalib?

- Staff*
- 1 staff member did not have any dislikes
 - 3 staff members needed more information on how to search
 - 2 staff members complained about slowness of access
 - 2 staff members did not know which categories to use
- Students*
- 1 commented on the need for better instructions
 - 5 had no dislikes
 - 1 commented that they sometimes had to have bytes available to access a resource, e.g. Google

General comments

- Staff*
- Would like training
 - Searching could be more user-friendly
 - Large number of resources to search
- Students*
- Need training
 - No disappointments
 - Internet billing could be a problem when using some resources
 - Educational, informative and easy to use

Screensavers

It was decided that having a screensaver on the computers in the Library indicating that Metalib and SFX would soon be available at the Library would catch the student's attention. We contacted the Technikon IT Department, and one of their staff agreed to design a screensaver for us—free of charge. The screensavers were installed approximately six weeks before the launch.

Posters

The Technikon Media Centre provides a free poster design service for the Technikon Departments. However, we would have to print and laminate the posters ourselves.

Two sets of posters would be needed, one pre-launch to indicate that students should watch out for Metalib and SFX, and the other post-launch, indicating that Metalib and SFX had arrived. Having four branches, we could not afford many posters. We eventually came up with the idea of printing the posters in two parts. The top part of the poster would indicate whether the products were due or had arrived and the bottom part would be a large blank rectangle topped by the words: “watch this space.” We would use the blank space for placing changing messages about the products to the students.

Bookmarks

Giving users something to take away with them would reinforce our message. We printed 500 bookmarks to be handed out on the day of the launch. The bookmarks were of a similar design to the posters and included five quick steps to using Metalib on one side and a short description of SFX on the other.

Pamphlets

Our training librarian condensed the search process on Metalib into a few easy steps. Pamphlets containing this information were placed at all the terminals. The information used for the pamphlet was also placed on our web site as a bilingual guide to using Metalib.

Article

To attract the attention of the Technikon staff, we placed an article in our in-house publication, Bulletin, which is published monthly in both printed and electronic format. The article is attached (Appendix A).

Word of mouth advertising

Having attended the initial demonstration session, the librarians had a good idea of how the products could be of value to their lecturers and researchers. We asked them to promote Metalib and SFX to Technikon staff by discussing the products, and describing the value they could offer to users.

Caps

We thought it would be a good idea for all library staff to wear caps on the day of the launch and for a few days afterwards to encourage users to approach them should they require assistance or have questions. Unfortunately, although the caps were not expensive, we could not afford them. Our Senior Librarian: Technical Services, decided to approach companies for possible support. Gestetner, provider of our photocopy machines, kindly agreed to assist and provided the library with 65 caps embroidered with the words “How can I help you?” These arrived two hours before the launch.

Display

No library marketing campaign would be complete without an in-house display. However, we wanted a display of available electronic resources to be fresh, and to coincide with the public launch of MetaLib and SFX. To create maximum impact, we decided to open the display on the day of the launch, concentrating it around the area of the launch event. After the event the display was moved to the familiar display areas at the front entrance to the Library.

Thanks to the support we received from various Technikon departments and the sponsorship of the caps by Gestetner, the total marketing campaign cost us R514 (equivalent to approximately \$70 or 50 British pounds).

The Launch

We decided that to successfully promote the use of Metalib we would need the support of the Technikon staff, especially the lecturers. As we had limited funding available for entertainment, we had to be very selective as to whom to invite to the launch. We managed to get the Rector (Vice Chancellor) to host the launch day event and the Chairperson of the CALICO Board, Professor Anthony Staak as the guest speaker. The main event was the live demonstration of Metalib and SFX.

The guest list reinforced the training and product promotion and included all Deans of Faculties, Library Committee members and Library Management Team staff. The only direct cost of the launch was that of the finger lunch which amounted to R30 per head.

We invited the staff of the Technikon Bulletin to the launch, as well as staff from our Media Centre to make a video recording of the event. The video recording cost R120, but was accepted as a small cost towards marketing the library event.

We were pleased with the enormous turnout at the event. The general feeling after the event was one of eager anticipation. We had achieved the main objective of our marketing campaign—we got our users excited about our product.

Conclusion

Inadequate resources and unstable financial and staffing situations need not be a barrier to accomplishment. Centres of excellence can succeed in developing environments, provided that the elements of commitment, enthusiasm and supportiveness are present. Certainly, the centrality of donor funding also needs to be acknowledged.

In the case of the Cape Technikon, the spirit of Ubuntu infused the teamwork and played a clear role in sustaining the morale of staff involved in the implementation process, by placing emphasis on shared responsibility and effort. The successful implementation of Metalib and SFX at the CALICO group of libraries is an affirmation of communal endeavor and solidarity of purpose.

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Appendix A

A first in Africa @ your Library



The Cape Technikon Library will soon be introducing a new and exciting platform for a hybrid library. It will include both emerging digital resources and traditional print resources.

While the Internet has greatly improved access to information, users are experiencing increasing difficulty in navigating and locating the most relevant data in the expanding body of scientific and scholarly information. MetaLib provides one gateway to both local and remote resources while allowing the user to remain within one familiar and uniform system—a one-stop-shop. Modern information management involves more than merely guiding users to a set of resources. MetaLib includes the catalogue, our Library's online databases and other Internet resources. SFX is the revolutionary tool offering direct linking to fulltext, abstracts, indexes and citations appearing in research articles, e-print archives and other Internet resources.

The Cape Technikon Library continues to be your innovative gateway to information.

Contact a Library staff member for further information.

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[http://southernlibrarianship.icaap.org/content/v05n01/becker_d01.htm.](http://southernlibrarianship.icaap.org/content/v05n01/becker_d01.htm)