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Jennifer L. Wondracek

University of Florida Levin College of Law, wondracekj@law.ufl.edu

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Have You Seen the New Library Bar?: Designing a Legal Research Toolbar

By Jennifer Greig¹

Abstract

It seems like more and more people today are selecting their legal research results based on ease of access rather than the completeness of the results. After hearing one too many third-year law students say “I researched my entire paper on Google,” I set off to create a tool that would satisfy both the desire for speed and the need for complete and authoritative research results. The tool is a legal research toolbar that integrates into a web browser and provides constant and quick access to library-sanctioned websites and databases. This paper walks readers through the design process of the Barry Law School Toolbar, including conception, negotiating with IT, and testing.

Article

Have you ever heard one of these worrisome statements?

“I researched my entire paper/brief on Google.”

“We have a catalog?”

“I cited to Wikipedia a lot...”

“I couldn’t find it on the library homepage, so I moved on to Google”

“All our library provides is a bunch of dusty old books and Lexis and Westlaw”

“[Insert derogatory legal research quote here]”

Unfortunately, I am certain that many of us have heard these statements and many more.

One afternoon last Spring, I was particularly despondent after hearing a student spout off the statement at the top of the list. I was flipping through the May issue of Library Journal as I wondered how I could combat this more and more pervasive mentality that if I do not see it in five minutes, it is not here. Suddenly, the answer literally appeared in front of me.

I ran across a brief mention in the ALA Library Journal that the University of Illinois Urbana-Champaign was experimenting with a library toolbar.² According to The New Oxford American Dictionary, a toolbar is “(in a program with a graphical user interface) a strip of icons

¹ Jennifer W. Greig is a Reference Librarian and Assistant Professor of Law Library at Barry University, Dwayne O. Andreas School of Law. Many thanks to the entire Barry Law Library staff for their support and suggestions while creating and launching the toolbar, particularly Ann Pascoe, Glen-Peter Ahlers, and the entire IT staff.

² Norman Oder, “Is the Web Reference’s Future? New Venues, Better Toolbars, and Smartphones Scrutinized at ACRL” Library Journal, 23-24, May 1, 2007.

used to perform certain functions.”³ In other words, it is a tool that provides access to computer resources. Two examples which most people will be familiar with are: 1) the Menu toolbar in Internet Explorer, which provides access to the popular menus file, edit, view, favorites, tools and help, and 2) the Google toolbar which puts a Google search box directly at the top of your internet browser. The main advantages of these toolbars are that they provide easy access to frequently used tools and that they are always available, no matter what site you are looking at.

The University of Illinois Urbana-Champaign created a toolbar that integrates into a person’s internet browser. According to the University Library’s website,

Once installed, the toolbar gives you quick access to:

- Departmental library websites
- Ask a Librarian webpage
- searching our library's catalog
- searching our Online Research Resources
- searching the Campus Phonebook
- searching Google
- and more...⁴

This was a type of tool that I already used daily. Why not create a toolbar that utilized and promoted my library’s resources and make it available to our patrons? And thus, the Barry Law School Toolbar (BLST) came to be.

Step 1: It’s Alive! It’s Alive! (or Toolbar Creation)

The creation process is perhaps the most involved of the steps. To help clarify the process, I have divided it up into substeps.

Substep 1: Planning

³ The New Oxford American Dictionary, 2nd ed. s.v. toolbar (2005).

⁴ University Library, “I-GO the library toolbar,” <http://www.library.uiuc.edu/toolbar/> (Updated May 2, 2006) (Last viewed Sept. 30, 2007) (permanently archived at: <http://www.webcitation.org/5SFQB5xkN>).

I am usually the kind of gal that wants to play with something first and then go back to the planning stage. With the toolbar, however, I found that I had to really stop and think about what I and the other library staff members would want to see on the toolbar. I knew that it could not be too cluttered or disorderly if I wanted anyone to use it. Yet, I wanted to make sure that there were enough resources on the toolbar to make it worthwhile. So, I ended up sitting down with good old-fashioned pen and paper and writing down what I thought should be on the toolbar.

After I made my original list, I went onto our intranet and internet sites and surfed them for a while to pick up resources that I had not yet thought of, such as the student's special page for finding out grades and a few human resource web applications for the employees. When looking at the final list, it was fairly easy to categorize the links into four major sections: search engines, library databases, things you need to log into (named "Log into:"), and free legal research links. I also had a vague idea that it would be nice to be able to communicate with the students through the toolbar, but I wasn't sure how it would work yet.

Substep 2: Finding and Choosing a Toolbar Creation Application

There are a lot of different free and fee toolbar web applications and software that you can try. If you do a Google search for free toolbar creator you should get something like 109,000+ results. I did not try every one of the different applications out. My method of choosing it was pretty simple: I reviewed several web applications, but decided to use one that other toolbars that I liked and trusted were using and that was free. I chose Conduit's toolbar creator (www.conduit.com).

As with all free web applications and software, Conduit is not perfect, but for my library, it works. Conduit's pros include: 1) free except for staff time, 2) a wide variety of toolbar

options, such as search engine additions, drop down links, scrolling text boxes, and RSS feed readers, 3) very customizable, 4) fairly easy to use, 5) ability to create submenus for organizing links and 6) decent technical support. The cons are: 1) the default search engine is their version of Google, which puts a few more “sponsored ads” at the top of the real Google results, and 2) you need technical support help to add search engines that do not place search terms into their URLs. As with all choices, you should review your options and choose the application that best suits your needs.

Substep 3: Building your Toolbar

In my spare time, I began experimenting with Conduit’s free toolbar creator. I will admit to knowing quite a bit about technology, but not nearly enough to be considered a true techie. That said, I was expecting the toolbar application to be fairly complex, but was pleasantly surprised to find an easy WYSIWYG (What You See Is What You Get) user interface.

Basically, the application is set up so that you select the toolbar elements that you want included (search box, drop down menus, marquees, RSS feeds, etc.). The toolbar is then created and you see an actual visual representation of the toolbar. In order to add or change items on the toolbar, you just click that section of the picture and the option to edit that section appears. Adding menus and links was also easy to do with simple mouse clicks.

The hardest part of building the toolbar was deciding upon the layout. I knew that I wanted four major categories, but subdivisions took a while to decide upon and organize. Once my layout was determined, I moved on to entering my list of links, which is truly a never ending process as I am continually adding new resources to the list.

If you are having trouble using your toolbar software, take some time to explore the user manual or whatever technical documents are available. Web forums where you can post

messages to other users of the software can also be very helpful in figuring out how to use your new application.

Substep 4: Self-Testing

Before you show your toolbar off, it is always a good idea to test it yourself. Testing it yourself makes you more aware of how the toolbar functions and how users will interact with it. You also will find it easier to show someone else what features the toolbar contains if you have used it yourself.

I also discovered that testing it in all of the browsers that the toolbar can be used with is helpful. For instance, when testing the BLST, I installed the toolbar into both Internet Explorer and Firefox to make sure that it functioned properly. When I compared the two, I found out that there are slight functionality differences between the two browsers when using conduit toolbars, such as where your search engine drop down list is located. Since I had also been playing with the gadgets feature of conduit's toolbar creator, I found out that the Google Maps Directions feature that I had included on the bar worked in Internet Explorer, but not in Firefox. This was important to know since I did not want to show the administration a tool which did not work in the middle of my presentation.

Step 2: Please Let Me Do this! or Gaining Administration Approval

This step may come before or after step 1, depending upon your institution and its traditions.

When I began my BLST adventure, I thought that if I could show my administration a working product that did not require additional funding, they would automatically jump at the chance to embrace it. I was wrong.

My director was interested in a tool that subtly marketed the library to students and faculty, but he was skeptical of the toolbar technology. My first order from him was to have the IT department review the toolbar.

Substep 1: The IT Department

I have heard mixed reviews from other law librarians as to how well they interact with the IT Departments at their schools or firms. Some rave about how lucky they are and others believe the IT Department to be their archenemy. Even if you are best friends with the IT people, however, you want to be diplomatic about bringing new technology to them. You may very well have to negotiate with the IT department regarding web surveys for testing feedback, actual release of the toolbar to your patrons, installation of the toolbar onto school or firm computers, and technical support for users with installation problems. Although you must be diplomatic, do not be afraid to show your enthusiasm for the project, since this may impress upon the IT person that this is an important project for you.

I am one of the lucky librarians who has a pretty good relationship with my IT colleagues. When I approached one of our IT employees, I began by describing this great “research” tool rather than a new piece of technology. I explained why I thought this would be beneficial to the library and what types of resources I had included. I then asked the person if he would examine the toolbar to make sure it would work with our and our students’ systems and make sure that there were no other technological problems with it. The IT person agreed to look at the BLST and said that we would have to make very certain that it did not contain spyware, viruses, or other kinds of malware, none of which I had even considered being a risk.

Be aware that if you approach the IT Department during a busy time for them, it may take weeks for them to get back to you. I specifically chose to approach the IT Department with my

request for help during the summer, when I knew business was a bit slower for them. As a result, my IT friend was able to look at the toolbar and give it a clean bill of health in a relatively short period of time.

Substep 2: Official Administration Approval

If you are lucky, the person that has to approve the toolbar will be very impressed with your efforts and will understand immediately how this toolbar will help the library. If you have doubts about your toolbar's reception, make a list of the pros and cons of the toolbar before you present the toolbar to them. Even if you do not provide them with the list on paper, it will help solidify the reasons to support the toolbar in your mind during the presentation.

If you have the opportunity, do a test run of your idea or actual toolbar with a trusted colleague or friend. They can help identify issues that you may want to cover in your presentation, as well as ask questions that may come up later, giving you the chance to perfect your answers.

In my case, after obtaining the OK from our IT department, my director felt much more comfortable in allowing my toolbar to go forward. He saw the sense in having our resources be readily available right from the browser, and liked the idea that more of our resources would hopefully be utilized. He even provided some improvement recommendations. Before giving final approval, however, he wanted me to test the toolbar with a small group of people to make sure that the toolbar held up to their usage and was something people would actually use.

Step 3: Testing, Testing...

The testing phase of your toolbar can be very useful, but you must also approach it realistically.

This was the first time that I was running a beta test of a research tool. Initially, I envisioned a two week to one month test where everyone participated fully and I received feedback via a web survey that would provide me with plenty of proof of how successful the toolbar was, which in turn would prove my toolbar's worth to the administration. I am still convinced that someone, somewhere will have this type of experience, but it certainly was not mine.

Substep 1: Planning

Before you jump into your beta testing phase, take some time to plan it out. You need to answer a few questions before you begin recruiting users:

1. What type of feedback am I looking for? This can range from “Do you like it? Yes or No” to “What additional resources should we include?” Make sure that you ask for information that will not only build support for your toolbar, but will also help you improve your toolbar. Make sure to ask your administrators if they would like you to ask any specific questions so that you meet their needs as well.
2. Who is included in my ultimate audience?
3. Who should my betatesters be? This may not be the same as your ultimate audience. For instance, I was not allowed to test the toolbar with first year students since we wanted all first year students to have similar research instruction and tools.
4. How long should my betatest be?
5. What feedback format are my beta testers going to be most comfortable with? This may not be the same for all of your testers.
6. What can I do beforehand to make the process easier for my betatesters? There may be many different responses to this question. Two items that I found helped my

betatesters were 1) a webpage with links to all of the important toolbar items, including the download file, feedback survey, etc., and 2) provide tutorials on how to install and use the toolbar.⁵

Substep 2: Recruiting Betatesters

When I began the BLST betatest, I thought finding betatesters would be a simple process. I sent an email to ten students that I thought would help and asked the LRW professors to also join the testing process. While most of those that I asked to test the toolbar agreed to participate, two weeks into the process, I found out that only three people had installed the toolbar. Rather than harass busy students and faculty, I slowly added more people to the tester pool until I was happy with the number of downloads.

Substep 3: The Test

The actual test can be as structured or free as you would like. I was able to compare the results of having one set of testers who could install, examine and use the toolbar at their leisure with another set that only had access to the toolbar for a short period of time on school computers. Both sets returned feedback that I found helpful, but I did not find one method significantly better than the other. Use the method that works best for you and your betatesters.

Substep 4: Feedback

Feedback can be really helpful if it is constructive. I recommend structuring your feedback survey or whatever tool that you choose to use so that you ask for more substantive feedback. Yes and No answers can answer a question, but give little insight into user experience and preferences.

⁵ I used the free website Screencast-o-matic, www.screencast-o-matic.com, to record short video tutorials on how to install and use the toolbar. The tutorials are hosted on the Screencast-o-matic website for free.

While gathering enough feedback to be useful is important, remember that the feedback needs to be in a useable format, too. If your primary use of the feedback is to prove the toolbar's worth, make sure that the feedback is concise and to the point for your administrators. Statistics and charts may well be worth the time to compile. If, however, you are using the feedback to tweak the toolbar, full length comments are useful to review when making changes.

Finally, remember that while you are creating this toolbar and probably are feeling a bit possessive of it, you are building it for others. If your betatesters are requesting a change, be sure to truly think through the suggestion before dismissing it. You also want to make sure that you do not make changes automatically when suggested, however, because the toolbar needs to retain its smooth flow and not become cluttered or just a hodgepodge of links. Make good, well thought out use of the feedback.

Step 4: Finalizing

This step name is a bit misleading. You are never really finished with the toolbar. There is always a new resource that is created that would be great for the toolbar or a new toolbar feature may be added that can improve the toolbar.

For instance, after I first created the toolbar, Conduit released a new option to add “gadgets” to the toolbar. Gadgets are “miniature objects... that offer cool and dynamic content...”⁶ These gadgets provide pop-up applications such as calculators, calendars, radios, driving directions, and translation services. There are many websites that now offer dozens of gadgets, including Google Gadgets,⁷ Yahoo Widgets,⁸ and many other independent gadget

⁶ Google.com, “What Are Gadgets Powered By Google,” <http://www.google.com/webmasters/gadgets/> (last viewed Nov. 13, 2007).

⁷ <http://www.google.com/ig/directory?synd=open>.

⁸ <http://widgets.yahoo.com/>.

makers.⁹ After getting lost in the Google Gadgets page for a while, I finally decided that the BLST users may very well like access to some of these new gadgets. Thus, the Tools menu on the BLST was created. Users now have access to a calendar, a calculator, a to-do list, translation services, driving directions, Orlando traffic information and a radio (at several students request). While these tools do not exactly promote the library's resources, they do provide useful tools to the users and increase toolbar usage.

The finalizing step is meant to get you to a point where you and your administrators are happy with the current design and contents of the toolbar. You should feel comfortable with allowing free patron access to the toolbar. Remember, however, that the toolbar should never stop evolving since your library and information resources will hopefully never stop evolving.

One important task that you should accomplish before your official launch is to bring your IT department up-to-date with the toolbar. The various IT employees should be informed of at least the following issues:

- The toolbar exists.
- The official launch date (and beginning of technical assistance requests with the toolbar) is [date].
- Users can download it at [website address].
- Tutorials are located at [website address].
- If there is a problem with the software, contact [name, phone number and email].
- If administrative rights are restricted on a person's computer, they may need an administrator (usually the IT employees) to install the toolbar for them.

⁹ See for example, Labpixies - <http://www.labpixies.com/> - or the Snipperoo Widget Search Engine - <http://directory.snipperoo.com/>. For more information on gadgets and widgets in general, see <http://webopedia.com/DidYouKnow/Internet/2007/widgets.asp>.

Hopefully, your IT colleagues will have the time to test the toolbar before the launch and become familiar with it.

Step 5: Official Launch

If you have reached this point with your own toolbar, congratulations! The official launch is both exciting and nerve-wracking. Hopefully, everything will go smoothly, but do not be too upset if there are a few bumps in the road.