

Email to VuFind Early Adopters List from Paige Weston, CARLI Office, April 29, 2008

Hello, VuFind Early Adopters!

I am very pleased to share with you, a little earlier than we'd anticipated, the URL for Early Adopters' first opportunity to test VuFind: <http://xxxxxxx>

We're very excited about the potential for VuFind to improve your users' access to I-Share and the resources to which I-Share will direct them.

OVERVIEW

This URL is being released now only to you, staff at VuFind Early Adopter libraries. You can use VuFind to search for and request the same titles you would search and request via WebVoyage (see details below). CARLI's goal is for Early Adopters to be able to roll VuFind out to their users by the last week of May 2008. CARLI hopes to receive your first usability test results or focus group findings by August 1, 2008.

This note contains many details you will want to know. Additional information has been posted at <http://www.carli.illinois.edu/mem-prod/I-Share/opac/vufind-early.html> for those who want even more. Eventually, and for the duration of the early adoption/beta period, VuFind itself will link to this web page, where development status information will be posted.

WHERE TO REPORT PROBLEMS, AND WHAT TO REPORT

VuFind continues to change. Some parts are not yet done and so we don't yet need for you to report those parts as problems; see details below. Other parts are done-for-now, and problem reports about those parts should be sent to support@carli.illinois.edu. We encourage you to use this list as well, vf-early@carli.illinois.edu, for comments, discussion questions, usability test coordination amongst yourselves, etc.

IMPORTANT DETAILS

Please read this note carefully, and share this information with others at your institution who will be participating in VuFind testing:

- The bibliographic records searchable via VuFind will be a little bit stale. They reflect what was in each I-Share library's catalog as of 3AM the previous day. (Today, April 29, the bib records are current as of 3AM April 28.)
- Patron and holdings data, on the other hand, are pulled dynamically from the production Voyager system. This means that patron account data, item status data, etc. are completely current.
- Requests and renewals performed in VuFind will be real, affecting production Voyager records.
- Anything on the WebVoyage "My Account" page will be visible on the VuFind "Your Account" page, and vice versa. The exception to this is that the patron address that VuFind displays on the Contact Info tab of the Your Account page will be the address Voyager would actually use for printed notices (the temporary address if it's within dates, otherwise the permanent address) rather than the permanent address in every case. The email address that displays on the VuFind Your Account page will be the email address stored in the Voyager patron record. This may or may not be the same as the email address the user has chosen to store in her VuFind account.
- The xxxxxxxx address is a temporary one, which will persist, as far as I can predict right now, only for the length of the "Early Adoption" period (end date to be determined). We

ask that you use your best judgment about sharing this beta URL. The CARLI Office does not plan to "publish" the vufind-beta address beyond the early-adopter libraries at this time. Remember that any links to vufind-beta that you publish will all need to be updated to the production URL, whatever that is, at the end of the test period. (We think now the production URL will be i-share.carli.illinois.edu/vf, but don't write that down.)

- You told us at the Early Adopters' Orientation Meeting that you would like to have four weeks for staff testing, and laying the foundations for your usability testing or focus group meetings, and preparing your publicity materials. CARLI's goal is to use the four weeks beginning today to complete development on the features you told us would have to be in place before you would show this product to your users, even as a beta.
- The xxxxxxx address currently points to a mid-sized server that we believe can support your test usage and more. Some of you might feel ready to make VuFind available to your users before the four weeks you asked for have elapsed. This will be fine. I remind you, though, that VuFind is an experimental service that is still in development, and that during the Early Adoption period—and particularly the next four weeks—the service may be unreliable (since we may need to stop and start things as we add new features or fix any bugs you identify).
- During this time when you are connecting to the xxxxxxx address, our programmer has promised to practice "minimally invasive techniques" for his ongoing work, so that your access is not disrupted more than it has to be. Nevertheless, I'm going to say it again: the server may go up and down; your VuFind accounts may need to be re-created periodically, or relinked periodically to your Voyager account; and you will need to be patient with us.
- The address I quoted above, <http://xxxxxxx>, will connect you to VuFind for I-Share-as-a-whole. We have also created VuFind "local" catalogs, which can be searched at <http://xxxxxxx>, where xxx is the usual three-letter code for your library. When you are searching VuFind "local," the library facet for your library is applied automatically to every new search. If you want to expand a particular search to all I-Share libraries, simply remove the library facet as you would remove any other facet. If you want then to narrow that search again to your library or another library's holdings, simply select the new library facet.

When you are searching a VuFind "local" catalog (that is, when the VuFind URL contains the `/vf-xxx/`), several things will be different from when you search VuFind for I-Share-as-a-whole:

- Your library's Cascading Style Sheet will be invoked, affecting the look-and-feel of all VuFind pages. (Right now the CSS for the "local" catalogs is only subtly different from the regular, full catalog's CSS, but you'll be able to change that soon!)
- Any SFX button that appears will be your own library's SFX button. The SFX button will display whenever the ISSN in the bibliographic record matches an active object in your own library's SFX KnowledgeBase. (When you are searching VuFind for I-Share-as-a-whole you'll see other libraries' SFX buttons on records with their holdings attached, unless you have logged in. Once you have logged in, your library's SFX button, and only your library's button, will display on any record—whether your library's holdings are attached to the record in Voyager or not—provided the ISSN matches an active object in your library's SFX KnowledgeBase.)
- Any new search you perform in the VuFind "local" catalog will automatically be faceted (our old word would have been "scoped") to your library's holdings. If you remove the library facet, the list of all available library facets becomes available to

you. In a "local" catalog your library's facet will always be at the top of the list. (Other library facets are listed in descending order by the number of records retrieved.)

- We continue to work on VuFind's functionality. The Browse function has been disabled for now, because it was fundamentally flawed. (You may remember it was buggy when I demo'd it on February 14.) We hope to re-enable Browsers eventually, when we have time to figure out how to fix them, particularly as the Browse function provided the only way to retrieve records on the basis of user-added tags.
- Similarly, we continue to work on some of what you told us at the Orientation Meeting had to be in place before you would roll VuFind out to your users, even as a beta product. You will notice problems with the following features. There is no need for you to report these problems at this time:
 - 856 field hyperlinks. We have a spec for the display of 856 field links, which we think will meet your needs. (See http://www.carli.illinois.edu/mem-prod/I-Share/opac/vufind_856_handling.pdf .) Coding has not yet begun, but is a very high priority.
 - Multi-volume/multi-item holdings. The display of multiple holdings for a single bib still needs work. This is also a high priority.
 - Format icons. Format icons are still not displaying correctly for some formats. Phase 1 will be to make VuFind's identification of formats no worse than WebVoyage's (that is, to base format identification on the bibliographic record type and bibliographic level code combination). Phase 2 will be to make subtler distinctions among formats. The I-Share OPAC Team is developing a spec for Phase 2.
 - Near-duplicate entries on facet lists. We have taken some steps to reduce "clutter" in the facet lists. We're evaluating additional strategies for de-cluttering the lists.
- Phase 1 of support for requesting ("request this") is complete. Phase 2 ("request other") and Phase 3 ("request any") will follow later.

AND IN CONCLUSION...

What have I forgotten to tell you? I'm sure you'll have comments and questions. Please send them to this discussion list, vf-early@carli.illinois.edu , so that your fellow Early Adopters can benefit. (Problem reports or notes you want to keep more private can go to support@carli.illinois.edu .)

We're excited to have so many Early Adopters volunteer for this experiment. And we're excited to be working with you. Let the testing begin and (except as noted above) let us know what you find!