7-19-2006

I-Share OPAC Team Minutes for July 19, 2006

Consortium of Academic and Research Libraries in Illinois

I-Share OPAC Team Meeting

Wednesday, July 19, 10:30am

Location: CARLI Offices, Champaign, IL

The meeting was called to order by Chair Hilary Kraus and committee members introduced themselves. Those present were Nancy Sosna Bohm, Skip Burhans, Kathleen Conley, Jonathan Gorman, Elizabeth Lowe, Amanda Pippitt, Jan Sung, and Stephen Wright. Also present were CARLI staff Paige Weston and Kathy Chang; Tom Goetz called in briefly mid-meeting.

1. No one volunteered to take minutes for the year. Skip suggested a rotating assignment, whereupon Nancy agreed to take minutes for the current meeting. Future minutes will be taken by committee members in an alphabetical rotation.
2. Terms of service for the Team were chosen as follows.

   Nancy Sosna Bohm (2006-2009)
   Skip Burhans (2006-2007)
   Kathleen Conley (2006-2009)
   Jonathan Gorman (2006-2009)
   Hilary Kraus (2006-2008)
   Elizabeth Lowe (2006-2007)
   Amanda Pippitt (2006-2008)
   Jan Sung (2006-2008)
   Stephen Wright (2006-2007)

3. Paige presented an overview of WebVoyage (WV) customization with a packet of handouts for each member. Topics covered were 1) Different instances of WV, 2) Who customizes, 3) What can be done, and 4) What is allowed.
   1. Paige and Kathy have determined that there are 2,012 possible instances of WV, consisting of copies of 2 releases (2001.2 and 6.1) for each of the 65 institutions, each replicated 4 times in the Training & Development and Production servers. Additional instances are from duplicate instances running on backup and other servers.
      The relation of these instances to the Frequently Used Links (see
      http://office.ilcso.illinois.edu/Reports/ iuagopacc/opacctf_links.html) was explained.
   2. Customizers tend to be larger institutions. A lot of demand for customizing is just color changing.
   3. & 4) A copy of the 244 customization guidelines was distributed. Things customizable include: color, advanced keywords, limits, messages to patrons.
4. Pending issues addressed:
   - 505 8X
     Paige requested and received consensus for permission to fix the problem with parts of the record not displaying.
   - 300$e
     - Displays accompanying material's format
     - In the past, displayed twice: once under "includes" and once with other 300 fields in the "physical description" section
     Elizabeth explained that it is a means to ascertain which edition of an item has the record attached. The OPAC Team then decided that the information should display in the Brief view (as well as Full); 300 $e is moved into the Physical Description area with the other 300's.
       - Tom called in the midst of this point. We will continue to plan subsequent meetings informally. Fridays are good for Tom for in-person meetings; other days of the week should be fine for conference calls.

   - 856 E-mailing records problem:
     When you e-mail yourself a record, the lengthy url breaks. It is important for medical students, in particular, who wind up with a paragraph-sized link with perhaps half a dozen breaks. There is no config file to permit an elegant fix. Jon will investigate a workaround.
   - The instruction group needs to know ASAP of any impending changes that would impact their current re-writing of the tutorials, or there will be a loud, collective groan later. Minutes-taker thinks: Can tutorials have modifications built into them, since web content is by definition fluid? …especially since Endeavor is planning a new interface.

5. High priority future projects:
   - Develop a mediated process for WV customization of color changes (most desired change and not possible for many institutions because of the intense training requirements) and/or a customizing wizard, and redesign training for customizers accordingly
     - Consensus is that a finite choice of a few colors would not be accepted by institutions.
     - Entering individual choices into the code is a lot of work because of all the places color codes are used, even if performed only once, but would also have to be done every time there's an upgrade.
       Kathy sees a way to automate the changes if there is a finite number of colors that change.
     - Nancy willing to make grayscale buttons at the drop of a hat.
     - Result if color-only customization implemented: Downscale scope and frequency of customization boot camps; replace some with clinics for particular customizations.

       ********************************Lunch Break********************************

   - Reevaluated search types currently offered in WV…
     - Indexes have been created that would allow users to search with an initial article and still find the item they're looking for. It was agreed that Paige will implement these indexes on the Test server for both TALL and JALL searches for OPACT's home libraries, and the Team will test and note places where wording must be changed accordingly. Amanda noted that the change would have to be made before fall semester BI's. See also item 4, bullet 4 above. High priority item.
     - Considered adding a Title Words keyword search (default operator AND) to the Basic Search page (requires SysAdmin change).
       Considered adding the HKEY (holdings keyword search) index to the Advanced Search page's drop-down list.
       Considered adding keyword-in-heading search (results show subject headings list instead of titles list), which would slow down server. Nancy says patrons would rather have an extended period before time-out.
       All of these will be tested for possible implementation for fall of 2007.
   - Considered a spell checking tool, which was voted high priority at previous meeting and again.
6. Second tier priority possible future projects considered:
   - Display:
     - Add format icons
       There are problems like one "music recording" icon for different media, but another icon for music scores.
       --will revisit after Kathy & Paige determine if greater specification can be made – Minutes taker Nancy is willing to try to come up with something that works if greater specificity is not possible.
     - Consider adding a colored background or other design element to warning/error/alert messages, as an alternative to making them take up more vertical space in order to get people's attention
     - Develop "cool" view buttons like Texas A & M's, i.e.: þ
       --will revisit on email
   - Terminology:
     - Considered and nixed the idea of describing the call number browse as "browse shelf" (or some variation of this).
     - Considered renaming "Limits" to "Filters," or something like that
       --would need usability testing.
       Note on such testing in general: There is no CARLI body as of yet to test, but there is hope that individual institutions will test.
   - Functionality:
     - Determined that we could borrow Texas A & M's Perl and JavaScript technique for making the SFX button appear in a reasonable place in WebVoyage, on reasonable records (e.g.: periodicals), and that we could use their code basically as-is. High priority for near future.
     - Investigate whether with local code we could make truncmsg.htm or nohitsmsg.htm search type-specific by parsing the search type out of the current URL. For instance, if &Search_Code=JALL or if &SL=Submit%26TYPE%3Das in WV instance XXX, then nohitsmsg.htm could be made to include the suggestion to search http://sfx.carli.illinois.edu/sfxXXX/a-z <http://sfx.carli.illinois.edu/sfxXXX/a-z> (the link would execute the search on the user's search argument): if so, it would not work for institutions using Serial Solutions. We acknowledged that context-sensitive no-hits messages would be nice. However, it would require a lot of editing of help text, which would ultimately impact the committee that works on tutorials.
   - Help pages & text:
     - Insert some anchors at the top of the MyAccount page, to allow users to jump down to the beginning of the Requests or the Fines & Fees section, since looking at some MyAccount pages can involve a lot of scrolling. Paige will investigate technical options.
     - Revise help screens into FAQs? Sounded good but determined would require A LOT of

work.

- Shoehorn some additional help text onto the "Edit Search" (Search History) page? There is a full screen-width to fill where it now says, "Edit or Rerun Previous Search." Cannot reverse the number order so that the first search is number one. L

  - Training efforts: Create a checklist for libraries to use when testing development or upgraded instances of their catalogs. Paige indicated this would be a very good contribution from our committee.

Paige reviewed items to-do from above (initial article indexes and SFX button have first priority).
The Team determined to hold the next meeting on Thursday, July 27, from 2 - 3:30.
Meeting was adjourned about 3:20pm.