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I-Share OPAC Team Minutes for June 9, 2009

Consortium of Academic and Research Libraries in Illinois

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I-Share OPAC Team meeting

Tuesday, June 9, 2009

10:04 a.m.

Present: Karen Becker, Nancy Bohm, Jana Brubaker, Kitti Canepi, Paula Dempsey, Keith Eiten, Jonathan Gorman, Gregory Morrison, Amanda Pippitt, Susan Prokopeak, Paige Weston

Minutes recorded by Kitti

Minutes from May OPAC Team meeting

- Since there were no suggested edits after Jana sent them out May 14, Paige posted them.

IUG Annual Meeting Report

- Amanda, Jon and Keith shared information from the IUG meeting. There was some confusion over the usability testing wording. The call for volunteers was modified to clarify that testing is for the public interface, not staff clients. A check box was added to the form to indicate that the library administration agrees to participation in testing. Future agenda item for I-OPAC: pull together CARLI and other documentation available on the web related to usability testing and plan a webinar or forum on the topic. Other possible forum/webinar topic: how to customize WebVoyage.

Update from Paige

- Voyager 7.1 upgrade:
 - Paige's goal for the WebVoyage webinars is to have at least one person from every library attend (so far 75 out of 76 libraries have someone registered). Several OPAC team members helped her with the dry run last Friday. One recurrent question in the webinars so far has been related to the "snapshot" catalog available during the upgrade: the data was saved on June 7 for this purpose, so will be a little stale.
 - The upgrade is scheduled to start on Sunday, June 14, at 4 AM with the hope that everyone will be back in business on Tuesday (but be prepared for Wednesday).
- Punch list of functional things to work on after the upgrade:
 - Syndetic Solutions cover images would have been one of the items but has been resolved. The trade-off was no reformat-for-printing function (due to a bug), although users can still print through the browser print function. CARLI will look into the bug later.
 - The repeat search in I-Share link doesn't yet work.
 - Text me this call number won't be up right away.
 - The redirect for I-Share requests for items in your home library (the "AAA workaround") is not yet functioning.
 - The WebVoyage OPAC as a source for SFX will come later.
- Problems found that need to be resolved:
 - Graying out of quick limits for items not limitable doesn't work on the title list (shows as filter option, but doesn't work).
 - In the current I-Share OPAC users have no control over which library to request an item from: in

v.7 the users will be able to so. Once the recommended standardized UB policies are implemented, this won't matter, but for now there is some danger that certain libraries will be selected more often due to better name recognition or more liberal borrowing privileges. An incident has been filed with Ex Libris that this feature was dropped and we want it back.

- The table that displays in My Account for requested items has an inconsistency in what displays in the database column depending on whether the status is "requested" or "in transit." CARLI isn't sure how to fix that yet.
- Saved searches in My Account had to be turned off for everyone because legacy searches that didn't run crashed the WebVoyage session. CARLI might be able to edit them to run or delete the ones that don't run (and notify the users what terms they used and how to change and resave).
- The back button mostly works well except when you drill down to a narrower topic and try to back up to go in a new direction (the system gets confused), although the navigation features will work for this.
- Opportunities for this group to discuss going forward:
 - Can customize local catalogs via CSS so that they look different from the universal catalog, but we need to set up a mechanism so that it is an easy process for the libraries.
 - Some things that worked in the past like creating "fake" languages so that a line would appear between families of languages don't work but the html creation file could be intercepted to insert groups (have to figure out how to generate this).
 - Add the prolific author/composer search to Author Browse (have to figure out what it should look like and how to do it).
 - Move the call number browse to its own tab as Shelf Browse and include display of cover images.
 - Improve the highlighting of the search term function (some libraries have already done this) so that it only highlights full words, not parts of words.
 - Use a Java script with course reserves so that once the user makes a selection (e.g., professor name or course), the rest of the choices are adjusted to avoid null sets. Possible usability testing topic.
 - Set up exporting of links to del.icio.us (some libraries already did for v. 6).
 - Offer drop down menu for the New Search boxes instead of defaulting to Any Word Anywhere. Usability testing topic.
 - Clarify to users what they have to do to get results from a subject browse (i.e., double click). Add an indication of the size of search results for narrower/broader terms. Usability testing topic.
 - An alternative to the time out warning such as an "ok" button that actually prolongs the session (but NOT the visible countdown).
 - Determine how much we want to modify the default fields that display on a single result view in I-Share (ex. add display of 544 note), and how much variability there should be between the universal and local displays.
 - Clarify language on the Basic Search page. Now default is "Search _____ within [search option]" which causes confusion for title searches over whether the title is still left anchored (it is).
 - Determine whether it is important that search be named consistently across the consortium and what the names should be.
- VuFind items:
 - CARLI added a drop down list next to the search box for users to select the local library or all of I-Share (end-user suggestion).
 - A relevance sorting fix was applied.

- It was pointed out that Yale and Bradley usability testing showed a preference for facets listed on the left, versus on the right as we have now. Possible future change?
- A member library that switched to VuFind as the main search interface has asked if they should continue using it. I-Share hasn't yet determined where we are going with VuFind. There is still no v.1 release date so CARLI is reluctant to do any major local development, although that is one of the options. Other options include emphasizing WebVoyage and waiting on VuFind, or moving on to an emphasis on the eXtensible Catalog (also not yet available). I-OPAC may have some input to contribute, but probably will be Susan Singleton's call.

IUG update from Keith

- Keith will check with Carlos on why the call for volunteers for usability testing has not yet gone out.
- There was good discussion at the Liaison Forum on May 21 regarding the future of the ILS.
- The charge has been completed for the Updating the Cataloging E-Resources and E-Resources Display in the OPAC Taskforce (they are working on a new name – Kitti suggested the E-Resources Cataloging & Display Taskforce). IUG is looking for wide representation, including someone from I-OPAC to review the documentation. Also needed are people with a reference background perspective on how things display in the OPAC. At the next IUG meeting they will work on a call for volunteers.
- The number of I-Share committee vacancies and volunteer worked out about right with only a few people not placed (mostly because they didn't specify what they wanted to do or their experience).
- The next meeting will be June 26 at Eastern.

Jon Update on RefWorks

- Jon will work on finishing the documentation in the next two weeks before he rotates off the Team and transitions to his new position at UIUC. The documentation will reference EndNotes also as the generic web service script should work for either. Jon will also enter the blue sky ideas from the last meeting onto the wiki.

Next Year Priorities

- Amanda reviewed the priorities noted in our annual report. This group may need to look at the test script document and revise it for V.7. Possible forums/webinars from this group include usability testing, customization of the OPAC interface, and teaching the new OPAC (jointly with the Instruction Team).

Other Items

- Jon indicated a willingness to still be a consultant on projects since he has related technical knowledge. Nancy is willing to help with image stuff.
- Amanda expressed thanks to those members rotating off: Jon, Nancy, and Susan.
- Paige announced the incoming members: Lisa Gonzalez of Catholic Theological Union, Edith List of Principia College, and Peggy Steele of UIUC.

Next meeting will be an in person meeting at the CARLI Offices in Champaign on Thursday, July 16th (the Thursday after ALA).