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I-Share OPAC Team Minutes for July 16, 2009

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I-Share OPAC Team meeting

Thursday, July 16, 2009

10 a.m. 3 p.m.
CARLI office, Champaign

Present: Jana Brubaker, Kathy Chang (CARLI Data Services), Paula Dempsey, Keith Eiten (IUG liaison), Lisa Gonzalez, Edith List, Gregory Morrison, Amanda Pippitt (chair), Susan Singleton (CARLI Executive Director), Peggy Steele, Paige Weston (CARLI User Services)

Absent: Karen Becker, Kitti Canepi

Minutes recorded by Paula

Update from Susan

Voyager upgrade: Performance remains the primary focus for CARLI staff, in particular the problem of "processes not quitting," which is negatively affecting performance.

VuFind: Serial Solutions hired VuFind's principle developer, effectively stalling any development of VuFind since last October. There remains a small but devoted group of VuFind users across the consortium, and though VuFind does not likely represent the I-Share catalog interface of the future, the efforts to develop and deliver this interface to I-Share members have been worthwhile.

Extensible catalog: The metadata toolkit for XC has been released. The OAI toolkit will be released soon, the Drupal toolkit will be released at the end of January. There is a challenge in making the FRBRized results understandable in the XC. It is not yet clear whether VuFind will be phased out after the XC is developed. It is encouraging that Serials Solutions is sponsoring and collaborating with XC. The vision is to put all kinds of data behind the XC, including commercial and noncommercial article-level databases, rather than continuing to work on the federated search approach.

Back-room modules for ILS: Ex Libris is working on next-generation ILS modules known as Unified Resource Management (URM). Duke is working on a Mellon grant-funded ILS known as Open Library Environment (OLE). If Mellon continues the grant, OLE will be released 30 months later. Open-source options for ILS will be a positive development.

OPAC Team introductions

New and returning team members introduced themselves and noted their goals for the year, such as having a positive, proactive, involved committee that is a true working group to shape new options for WV7 and the next-gen options (VuFind/XC). Paige intends to step back and provide support for the team efforts.

Team charge and background

Paige explained the historical task for this group was the look and feel of the OPAC by default and for the universal catalog. The customization guidelines listed elements that should be consistent in design for all individual

catalogs (e.g., indexing decisions, wording of item status). The team may decide whether this is still necessary and desirable. One benefit of requiring approval of design changes is that useful innovations from individual libraries can be implemented in the default version and the UC.

Brief and detail views in WV7

- Paige announced that the format-specific default views are still an open ticket. This is the idea that the brief records for sound recordings, films/videos, maps, and serials will have a different set of displayed fields. The decisions about the fields to display and their order will be made later.

- Paige will investigate the option of a collapsible view with more details available by clicking + or ☐.

- After discussion, the team concluded that members are more satisfied with the brief view. Amanda will post an announcement to the blog and/or send an email that the team is done with the selection of fields, labels, and sequence. Member libraries may now request further customization for their individual catalogs.

Documentation of display decisions

Paige will send Paula a link to the previous document, and Paula will sponsor revising it for WV7.

Review of OPAC enhancements log

Amanda led the team in extensive discussion of suggestions for customization of WV7 in order to rank their desirability and feasibility. The suggestions are ranked as high, medium, or low priority. The team declined to rank suggestions that call for usability testing. Those items will be presented to members who have volunteered to do testing. The document will be posted to the team Web site.

OPAC customization guidelines

Peggy will sponsor revising the customization guidelines for WV7. Amanda will note the types of requests that members make at the customization webinar next week to assess areas that might need to be added to the guidelines. Peggy will remove any areas that no longer apply to WV7.

WV7 test script for future upgrades

Lisa will sponsor revising the test script for future upgrades. This does not need to happen immediately. As she works through the suggested tests, she will note wording changes and questions for the team.

Search result data "columns"

Jana will sponsor decision making about which data fields should display in the results list. Only 3 elements can be displayed for each search type.

Documenting URL-launched searches

Paula will sponsor documenting how to create canned searches in WV7. Most searches can now be launched by

using the URL generated in the address bar, but she will provide instructions and caveats for some anomalies where the URL is not re-usable. We will decide later whether the record should also display the persistent link.

Sponsoring forums

Amanda led a discussion of ideas and options for the team to sponsor forums during the year. Paige reported that CARLI is updating the guidelines/suggestions for effective forum planning. We could co-sponsor with another work group. The forum can be web-based and/or face-to-face in one or more locations. The team focused on the idea of usability testing.

Usability testing

Paige reported that 18 volunteers have come forward for usability testing. [Note: The following day she clarified that these were volunteers to participate in testing as individuals, rather than to design and implement usability testing with their library patrons, as was requested.] After discussion, the team decided to work with volunteers by email and to track results on the team wiki.

Meetings for 2009-10

We will not meet in August. Starting in September, we will meet the 2nd Tuesday of each month from 10 a.m.-noon. The team agreed that meeting in person is more productive and enjoyable, but travel times are a barrier. We will try using Wimba for meetings, and we will meet again face-to-face in the spring.