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CARLI OPAC Enhancements Status Log

To suggest an enhancement to the I-Share public catalog, email the I-Share Users' Group [OPAC Team](#).

<p align="center">CARLI OPAC Enhancements Status Log Last updated: March 24, 2010</p>						
#	Issue	Details	Discussion so far	<u>Difficulty Level</u>	<u>Priority</u>	<u>Status</u>
1	Make it easier for libraries to customize their catalog's color scheme.	Develop a mediated process for WV customization, or a customizing wizard, and redesign training for customizers accordingly. This might be a pre-set "skins" approach or (more likely) a template to set up color changes. Update 07/2009: this should now be easier with WV7.	Our contribution to this would be to develop a system that allows libraries to specify a few color codes so their catalog would fit their preferred color scheme, rather than the default colors they have now. They could also submit their own button images and have CARLI upload them on their behalf. This would allow libraries that don't have the resources to be "customizers" to match their catalog to their school or library colors. Update 07/2009: Approach is now to offer Webinars to train librarians how to change color schemes etc. themselves. Preferred logos can be sent to CARLI support to add to local catalogs.	hard	high	Basic Webinars on how to change the look of WV7 local catalogs using CSS were offered in July & August 2009: slides , recipes
2	Reevaluate search types currently offered in the WebVoyage and VuFind OPACs, and which indexes they include; consider	Types of searches to consider include the Title Words search (default operator AND), the HKEY (holdings keyword search), and the new	For each of these search types, we'd need to test how they worked in WV, decide if they would enhance searching on the Quick or Advanced Search pages, decide if	medium	medium	*Usability Testing Needed

	changes and additions.	keyword-in-headings search capability.	they'd replace similar searches or be added in addition, and consider how this would change help text (which we'd need to modify).			
3	Add a spell checking tool	Add a spell check to WV so a search that found no results would ask, "Did you mean ---?" like Google, or something similar to that.	We'll need to investigate what tools are out there, whether they cost money, whether they'll work with WV, etc. Not likely to happen in the near future.	hard	high	referred to the Products & Services Vetting Committee; rudimentary spellchecker available now in VuFind
4	Terminology changes	Should we rename the call number browse as "browse shelf" (or some variation of this)? What about changing "Limits" to "Filters," or something like that?	Without usability testing, it's really hard to say whether this kind of thing will help or hurt. Individual libraries are encouraged to do their own testing and report back.	hard	low	*Usability Testing Needed.
5	What sort of message should users see when they get too many results? Too few results? How should they be redirected?	For example, if user gets no hits, could they be directed to search an SFX A-Z list or World Cat?		hard	low	no action at this time
6	Make help more FAQ-like.	Revise help screens into some more useful format? pop up boxes? more action-specific? recast as answers to FAQs?	This would require a tremendous amount of work, since virtually every help page would have to be rewritten. Because help is context-sensitive, the initial help page you see when you arrive there from the titles list page is different from what you see from the Quick Search screen. This prevents us from just building a single FAQ	hard	low	no action at this time. Staff and team resources better used on other projects; OPAC Team resolves to use the FAQ format for any new help text written,

			<p>page to serve as the gateway to help, and leaving the rest of the help pages as they are. The Usability Testing Task Force did hear from users that they'd be much more likely to click on a button that said "FAQ" than on one that said "Help." Would take a lot of effort to improve, and very few end-users use Help.</p>			<p>such as in any open source alternative to WebVoyage</p>
7	<p>Maintain search options in a drop down menu with search box at the top of every screen</p>	<p>In WV7, there is a nice search box available at the top of every screen, but it defaults to an "anyword anywhere" search. To do any other search, you must click back to the Basic or Advanced search tabs, which can become frustrating, especially when users assume that the box will perform the last type of search they executed.</p>	<p>Rather than have the Quick Search box "remember" the last kind of search you did from a search page, an easy change would be to add a drop-down list of search types next to the Quick Search input field.</p>	hard	low	no action at this time
8	<p>Add an "I'll go get it" button to I-Share.</p>	<p>GoogleMap mash-up to mark the location of libraries that have available copies of the desired title.</p>	none	medium	medium	no action at this time
9	<p>Add a "Where is my request?" button to the MyAccount page.</p>	<p>Providing the user with detailed information requires having the detailed information to provide. Perhaps as the delivery service evolves?</p>	none	currently impossible	low	no action at this time

10	Improve output format for EndNote; create output format for RefWorks.	Existing EndNote format reported not to work well with the newest version of EndNote.	Unclear how often this would be used. Do EndNote users search from within EndNote? Are there still large populations of EndNote users, or does everyone use Zotero or something similar? Looks like Hamilton College has come up with something successful for RefWorks. Will contact them.	medium	medium	in planning
11	Punch List from WV7 Upgrade.	Includes: a) Repeat search in I-Share links, b) Text me this call number feature, c) AAA workaround, d) WV as SFX source.	Agreed that these are all important features	medium?	a-b= very high, c-d= high	CARLI will do everything it can to re-implement for fall 2010 semester.
12	Move prolific author search to Author tab	Currently, the two types of author searches are separated, the 'regular' author search on its own tab, the 'prolific' search remains on the basic search tab.	Especially important for music librarians & patrons.	hard	medium	Keith will work up a spec for what he envisions this looking like.
13	Return search options in basic search to 'box' style?	WV7 has a drop down menu for search options in the basic search tab, we've gotten some comments that showing all the options in a box is preferable to some.	Some of us like the cleaner/shorter page that results from having a drop down menu, some of us feel that the drop down menu 'hides' the other search options, making them unlikely to be chosen by patrons even if they are a more effective mode of searching.	easy	unranked	*Usability Testing Needed.
14	Improve highlighting in search results	WV7 is overzealous in highlighting search terms, for example, if searching 'id or ego', 'id' and 'ego' may be highlighted	We could turn off the highlighting altogether, or try to improve. It looks like another school has improved the highlighting to be more "appropriate"	easy	medium	looks like another WV7 user may have improved on the

		as parts of other words, leading patrons to think they are getting false drops, even when they are not.	so we will try that fix first, and see how we feel. A few of us also feel the bright yellow color is too distracting.			highlighting, will contact them.
15	No highlighting on individual records	Highlighting is working on search results page, but not on single-record view page.			medium	Bug reported to ExLibris.
16	Supress result list filters on un-limitable searches	Quick limits 'gray out' appropriately, but in some cases, the filters box (aka "fake facets") will still show on the search results screen when not appropriate.	Not as widespread a problem as initially feared.	hard	low	no action at this time.
17	Make page titles distinctive	Webpage title in browser bar used to specify which local version of WV patron was in, but no longer does. Also, making the page title more distinctive (for example, on an item record, having the item's title or other information show up in the page title) could be important to those relying on screen readers.	So far, it doesn't seem like anyone has noticed the lack of the individual library's name in the page title, so maybe not that important? We would make the OPAC more accessible for screen readers, but it may take a significant amount of work and time.	re-adding library name-easy, making page titles distinctive for accessibility purposes-hard	medium	no action at this time.
18	Text/labeled link to Syndetics	Currently, patron must click on cover image or link that says "cover art" to see further Syndetics data, which is not intuitive.		hard	high	in development
19	Links to library	Would like each	There is some question as	medium?	medium	Amanda will

	webpages and/or contact information in My Account page	different library to be hyperlinked so that if patrons or circulation staff have questions, appropriate contact information is easily accessible.	to where the data would be drawn from, and whether libraries could control what would show (UIUC, for instance, may want links to chat reference available, but not an actual phone number).			work up a spec for what she'd like this to look like.
20	Add call numbers to My Account lists	Would make it easier for patrons with a large number of items checked out to identify which items are due when.	Reported to ExLibris, who says that it is not a bug. Is supposed to contribute towards "cleaner" look of My Account page?	hard	medium	no action at this time.
21	Re-word "charged items" terminology in My Account	"Charged items" may be too library-speak for patrons, who tend to associate the word "charged" with being charged \$\$.	Change to "Borrowed items" and also change the charged wording in "status" column to "checked out"	easy	high	in planning.
22	Remove blank link from UC's results page where call number would be	When there are multiple holdings, display looks ok, but when just one library owns a copy in the UC, there is a blank space where the call number should be, which looks weird .	Yes, this looks odd, but probably not the most important thing in the grand scheme.		low	No action at this time.
23	Cosmetic difference of UC	Identified as important in previous usability testing rounds.	Greg will work with Paige on color scheme.	easy once decisions on colors are made	high	in planning.
24	Other format-specific brief views	For serials, films, cartographic materials?	Serials would especially benefit from a shorter display that brings the local holdings information up on the screen, making it more noticeable to patrons.	easy	high	WV7 supposedly supports this, but is not currently working correctly. Bug reported to ExLibris.

25	Collapse/expand individual fields in display	Could make the default display easier for patrons to scan, more clean, but data would still be easily accessed when wanted	Records with multiple 700 fields may benefit from this idea. Perhaps display the first one, when have a collapse/expand icon with the label "see more" or "more."	hard?	high	in investigation stage.
26	Add optgroups to long drop down lists	For example, language limits could be "categorized" by "common languages" and "other languages"		medium	low	no action at this time.
27	AUTH redirect on 700 \$a=\$t			hard	medium-high	in development.
28	Modify the timeout warning behavior	Perhaps offer "quit now" and "continue" buttons as seen in another library.	The current warning is just a warning. Clicking on "ok" does not extend the session as some expect it to do.	medium	high	no action at this time.
29	Add location & item status to call number browse results			hard	low	no action at this time.
30	Reconcile EndNote, email, print export formats with online display formats	Would be nice to send the same fields, labeled the same way as the display format		easy	medium-high	in process.
31	Sortable My Account columns	Would be nice (especially for heavy users) to be able to sort My Account columns by due date, school, etc.		hard	medium	no action at this time.
32	Icons for print, email, etc. action items in "action box"	To make those options stand out more	Currently, many users are using a print screen option, which doesn't work well. We may also want to extend these icons/buttons over the top of the item record to	easy-medium	high	in planning

			mimic the way they display on a search results screen.			
33	Re-enable persistent links for item records			medium	medium	no action at this time.
34	Revise "no copies available to fill your request" message to suggest other alternatives.	Best advice would depend on format of requested item.	Refer to a librarian better if it's a hyperlink to appropriate library's contact info.	hard	unranked	no action at this time.

CARLI OPAC Completed Enhancements Log

Last updated: September 14, 2009

#	Issue	Details
1	Add format icons, such as for book, sound recording, serial, etc. to make it easier to identify format at a glance. More visually appealing.	Done in WV7 and in VuFind.
2	Add status icons, such as a green check mark for "available" and a red X for the various "not available" statuses. Easier to see at a glance whether item is available or not.	Done in WV7. VuFind has green dots for 'available', red dots and text for 'not available'.
3	Insert some anchors at the top of the MyAccount page, to allow users to jump down to the beginning of a desired section. Should make the (potentially long) page easier to navigate.	Done in WV7.
4	Improve documentation on how to add OPAC search boxes to library web pages.	OPAC Search Box Builder (for WV and VF) now available: http://www.carli.illinois.edu/mem-prod/I-Share/opac/opac_search_box_builder_wv7.php
5	Build a search plug-in for people's browsers that will execute an FT* (Any Word Anywhere, relevance-ranked) search in I-Share	Libraries can create these sorts of things themselves using plugins like LibX (Firefox browser plugin) and Conduit (plugin/toolbar for IE)
6	Index 090A in the "classificaton" search in the Advanced search screen	Done.

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