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I-Share OPAC Team Minutes for July 14, 2010

Consortium of Academic and Research Libraries in Illinois

IOPAC Meeting Minutes

July 14, 2010
I-Share OPAC Team in-person meeting
CARLI Office - Champaign

Members Present: Karen Becker (via phone), Kelly Fisher (minutes-taker), Paul Go, Lisa Gonzalez, Jacob Jeremiah, Edith List, Amanda Pippitt, Peggy Steele, Paige Weston (CARLI Liaison)

Member Absent: Jana Brubaker

Chair Lisa Gonzalez called the meeting to order at 10:03AM. Lisa asked for a volunteer to take the minutes and Kelly Fisher volunteered.

Member Introductions:

Introductions were made with members discussing their library background, areas of expertise, why they joined the team, what they thought the scope of the team's work was, and what they hoped happened this year. Some hopes included: learning about open source development, as it is very different from a commercially vended ILS, seeing progress with the eXtensible Catalog (XC) project, having a demonstrated role in approving OPAC decisions within CARLI, improving usability testing, and having a mixture of members speaking during meetings.

XC Demonstration:

At 10:30AM, the team joined the IUG meeting for a demonstration of the XC presented by Co-Executive Directors Jennifer Bowen and David Lindahl of the University of Rochester. Much emphasis was made on how everything is customizable, including the facets, search results list, and theme. The XC is run on the web content management system Drupal, which some members of the team are familiar with. One feature that was well-received was that separate search interfaces can be created to search for particular formats, like DVDS and Videos, Databases, and E-Journals, and locations like only the Art collection. The XC is still in development, but it looks like it could be the future online catalog of choice for CARLI. Susan Singleton stated that the new IUG will be helping determine when CARLI will adopt XC, but a lot of testing is needed before then. Decisions will also need to be made about the future of our Union Catalog, like do we move to Voyager 8, Tomcat, or Re-develop VuFind before the XC conversion takes place? Carlos Melian of the IUG forsees the OPAC team being very busy sometime during the process.

Lunch followed the XC demonstration from 11:55-12:15.

Post Lunch discussion of our thoughts on the XC demonstration:
The XC demo exceeded the expectations of the group. One big question that arose was *who* is going to be responsible for customizing the tool? CARLI? Individual libraries? What role will our team have in the process? In the past, the primary focus of the team has been to design the look and feel of the union catalog and design the features that needed to be the same in the local catalog. It may be best to design a template of features that CARLI can provide to every library for their local catalogs, then allow individual libraries to further customize and perhaps share their customizations across the consortium. A possible role of the team would be to identify the elements that could and should be "farmed out." We are going to have a major role in deciding how the union

catalog looks. We should create an "out-of-the-box" design for smaller libraries who can't re-design easily, with "insert logo here" customization options. It was decided that VuFind may be our I-Share Catalog for the unforeseeable future until XC is ready, so we should perhaps still work on that product, not just XC planning.

Report of the last IUG meeting:

Amanda gave a report on the last IUG meeting which she attended in Lisa's stead. Paige said that IUG is to concentrate more on the 10 year view of CARLI and facilitate planning so day to day activities reflect CARLI's future vision. At the IUG meeting, Susan stated that the CARLI developer spends 20-25% of his time on VuFind upkeep and change, but he will be moving most of his work to the XC project in November. That means if we have any changes we'd like to make in VuFind, we'll need to pass them along before November. IUG members also did not like how the title search works, to which Peggy said that we may need to inform users what VuFind is meant to do, which would explain why it doesn't work the same way as Web Voyage. It was also said at the IUG meeting that an instant update of cataloging changes was not likely, to the chagrin of catalogers.

Discussion of VuFind developmental tasks:

The team reviewed the customization form on the CARLI website (http://www.carli.illinois.edu/mem-prod/I-Share/opac/vuFcustom.php). Paige mentioned that the feedback link will soon be changed to be sent to local libraries as opposed to the CARLI support email, as many issues are better suited for local libraries to handle. Paige pointed out the VuFind Change History link (http://wiki.carli.illinois.edu/index.php/VuFind-changes) on the CARLI website where the most recent updates to the catalog can be found.

Paige reported on what is being worked on in VuFind. She had three different categories: easy changes, high priority changes to be done by fall, and other requests. Examples of easy changes include adding a text box to the patron item request form so they can put in notes like "only need volume 8" and removing the "request this item" link for libraries who do not have that service locally. Items on the high priority list include improving the Cite This functionality, a Request First Available option, correcting the Syndetic Solution information placement and inclusion in the local catalogs who subscribe to the service, deleting the simple search box and adding more language choices on the advanced search page, adding a link to WorldCat Identities for more information on the author (it used to link to Wikipedia), and adding a limit by publication date to the advanced search page.

Peggy volunteered to speak to a colleague about possibly helping with the Cite This improvement. Paige will send Peggy the information. As Cite This currently does not function correctly, it was suggested that the team come up with a statement to be displayed that warned users of the discrepancies. We will work on crafting this statement via e-mail.

At 2:00PM we re-joined the IUG meeting and Paige presented changes to VuFind. CARLI is working on Course Reserves searching in VuFind, a login time out function, researching left anchored title searching, and looking into indexing MFHD records into VuFind, which would enable call number and locations searching. Kristin Hammerstrand asked if we really needed Tomcat at all if we are going to use XC in the future. She also mentioned that you cannot use Classic with Voyager 8. Most likely Tomcat will continue to only be an option for local catalogs.

At 2:20PM the OPAC team returned to our own meeting and continued to discuss VuFind. Paige requested that

we work on prioritizing the list of high priority changes as a group. It will be sent via e-mail for discussion. Two big themes with changes are in regards to navigating between the local and union catalog and the sign-on process. Lisa made the suggestion of using book covers and reviews from Open Library, as it is a free source. Amanda asked if it would be possible to do bulk or batch item requesting in VuFind.

Review of committee charge:

The Committee Charge section found on the CARLI website was briefly reviewed and it was mentioned that new members received a good idea of the group's charge throughout the day's meeting.

Brainstorming projects for the year:

It was decided that much of this will take place at meetings throughout the year. The group reviewed the formation of the Usability Testing Volunteer Group last year and discussed that no feedback ever came in. It was loosely organized and did not work well. We may review this group and provide more direction. It is also a possibility in the future to offer training or forums on the XC when it is officially adopted.

Members were asked to look into their ability to use VOIP via Adobe Connect. We would need a headset with microphone and a computer with speakers as equipment. Members should let Paige know if this is possible, as it is an inexpensive alternative to conference call or in-person meetings.

Paige also reported that CARLI has licensed Digital Commons and will start posting minutes to that.

It was decided that the group will meet the second Wednesday of the month from 10AM-12PM. Dates include Sept. 8, Oct. 13, Nov. 10, Dec. 8, Jan. 12, etc.

The next meeting will be a conference call on Tuesday August 10 from 10:00-11:30AM.

The meeting was adjourned at 3:05PM.