2017–2018 CARLI SFX Systems Committee Annual Project: SFX and New VuFind Public Catalog

The SFX 2018 annual project tested and recommended SFX features and displays in the new VuFind 4 Online Public Access Catalog (OPAC).

The SFX Systems Committee worked with CARLI staff to test SFX linking, UI display, and other features in the VuFind 4 OPAC. We used Google Docs, CARLI's GitHub, and lists of action items to track features ready for testing or further comment. Feedback was also given on searching for e-resources and journals in VuFind 4 since that is closely related to SFX usage in an OPAC. Finally, the committee recommended several display changes to declutter screens and improve serial holding displays.

We also worked with Illinois Institute of Technology to further explore SFX features during their early adoption of VuFind 4.

- Summary of User Interface (UI) and User Experience (UX) features investigated:
    - Implementing customized SFX buttons for each library
    - Remove "Search alternatives" option
    - Remove "Suggested topics" option
    - Add a journal title search option
    - Add "Hide e-resources I don't have access to" options in all I-Share OPAC
    - Add Feature used by University of Chicago's VuFind whereby SFX links/menu displays on the full bib record
    - Requested that a list of compatible authentication systems be added to the FAQ (e.g. CAS, Shibboleth)
    - Tested VuFind 4 keyword relevancy searching especially for periodicals
    - Commented on Date, location and other facets display
    - Observed that institution facet in I-Share is not necessary

- Actions taken as a result of investigation:
    - Developer implemented customized SFX buttons for each library
    - The "Search Alternatives" option was removed
    - Libraries now have the ability to hide "Suggested topics" from the top of the facets section
    - A journal title search option was added
    - Users can hide e-resources to which they don't have access

- ○ When making I-Share requests the default now correctly indicates that location is not set, prompting the user to select a library branch
- ○ CARLI re-indexed data and and altered configuration file to improve keyword relevancy

- Items still pending with developer:
    - ○ Authentication linking is still evolving and committee will continue to give input
    - ○ Committee has requested that facets be compressed rather than open by default
    - ○ Email alerts for items requested through I-Share are not working

- Continuing work:
    - ○ Committee will test VuFind 4 keyword relevancy after Denise and colleagues work to improve it. Committee will continue to seek a solution to the 856 subfield z to ensure they are helpful for patrons
    - ○ Committee will continue to look at new VuFind and report any features they are interested in implementing