



CARLI

OPAC: Overview, Customization, Searching,
& Requesting

An Introduction for New I-Share Libraries

February 2018

- CARLI currently provides 3 interfaces for the online catalog:
 - VuFind 0.6 (open source)
 - New VuFind (open source)
 - WebVoyage (packaged with Voyager, from Ex Libris)
- Patron information (such as charges, requests, fines/fees, and blocks) is available in all interfaces.
- VuFind will be the primary focus for today.
- Libraries may use/purchase other discovery layers at their discretion and cost (examples: WorldCat, Primo, Summon, EBSCO, etc.).

■ WebVoyage

- The OPAC interface that comes packaged with Voyager.
- Local catalogs are available for each I-Share library.
- No I-Share union catalog version.

■ VuFind

- Open source interface initially developed and currently maintained by Villanova University's Falvey Memorial Library.
- Local catalogs are available for each I-Share library.
- I-Share union catalog is available.

■ **VuFind 0.6:**

- CARLI began using VuFind in Fall of 2007.
- At the time the product was not set up for consortia, and was not ready for consortial development, so CARLI “forked a branch” from the development tree.
- CARLI still troubleshoots issues; but no longer does enhancements to 0.6.

■ **New VuFind:**

- In 2016, CARLI staff began working on VuFind 3.
- New VuFind is significantly different than our forked version of VuFind 0.6, so we consider it a new system, rather than an upgrade.
- CARLI is actively participating in the development of VuFind.
- Running version 4.1 as of December 2017.

The I-Share welcome screen <https://i-share.carli.illinois.edu/> allows patrons to select their institution and OPAC version.



- I'll time you as you take a look at each version of the OPAC. Write down three initial observations of each.

■ New VuFind: <https://i-share.carli.illinois.edu/vf-trt/>









■ VuFind 0.6: <https://vufind.carli.illinois.edu/vf-trt/>









■ WebVoyage: <https://webvoyage.carli.illinois.edu/trt/>







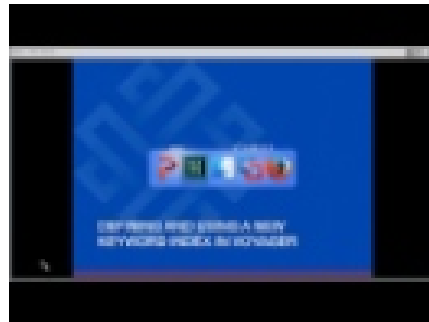


- What are the differences between New VuFind, VuFind 0.6, and WebVoyage?

https://www.carli.illinois.edu/products-services/i-share/opac/opac_differences

- Today's cataloging
- Left-anchored searches
- Holdings keyword searches
- “Command mode” searches
 - Video available from the I-Share OPAC webpage:
<https://www.carli.illinois.edu/products-services/i-share/opac>
under “Classic (version 6) WebVoyage Searches, Indexes & Displays”

DEFINING AND USING A NEW KEYWORD INDEX IN VOYAGER



Presenter: Paige Weston — CARLI Office

- More modern look & feel
- I-Share Union Catalog
- UB (I-Share) requests
- Facets for narrowing searches
- HathiTrust public domain, electronic full-text materials records
- CARLI consortially-purchased ebook collection (over 3,800 titles)
- Open Textbook Library records (420 titles)
- Greater functional accessibility
- Mobile-friendly interface
- Ongoing development with New VuFind

■ Logging in

- VuFind 0.6: users create own username and password
- New VuFind: last name/barcode or can work with Shibboleth

■ Call Number Searching

- VuFind 0.6: not available.
- New VuFind: <https://www.carli.illinois.edu/products-services/i-share/opac/vufind3-callnumbers>

■ HathiTrust public domain, electronic full-text materials records

- VuFind 0.6: CARLI loaded 1.2 million records in 2012; these records are static.
- New VuFind: HathiTrust records are updated weekly.

■ Mobile-friendly interface

- VuFind 0.6: Local Catalog only <http://m.carli.illinois.edu/vf-xxx>
- New VuFind: Local and I-Share catalog available with responsive web design for any device

■ Ongoing development

- VuFind 0.6: Frozen
- New VuFind: Ongoing!
<https://www.carli.illinois.edu/products-services/i-share/opac/new-vufind-faq>

You can keep up on our progress on reported enhancements and issues over on [GitHub](#).

- Redirection is library's responsibility.
 - (We don't manage your library's webpage.)
- CARLI's OPAC webpage > Connecting to I-Share:
<https://www.carli.illinois.edu/products-services/i-share/opac>
- URL to use for OPAC:
 - <https://i-share.carli.illinois.edu/vf-xxx/> (New VuFind local)
 - <https://i-share.carli.illinois.edu/all/vf-xxx/> (New VuFind I-Share catalog)
 - <http://vufind.carli.illinois.edu/vf-xxx> (VuFind 0.6 local)
 - <http://vufind.carli.illinois.edu/all/vf-xxx> (VuFind 0.6 I-Share catalog)
 - <https://webvoyage.carli.illinois.edu/xxx> (WebVoyage)
- URL to use for New Titles List:
 - <https://i-share.carli.illinois.edu/vf-xxx/Search/NewItem> (New VuFind local)
 - <https://webvoyage.carli.illinois.edu/newbooks/newbooks.cgi?library=xxxdb> (VuFind 0.6 local/WebVoyage)

- CARLI's OPAC webpage > Connecting to I-Share:
<https://www.carli.illinois.edu/products-services/i-share/opac>


▼ Connecting to I-Share

➤ The Right URL to Use

➔ VuFind 0.6 Mobile Interface to I-Share Local Catalogs

➤ OPAC Search Box Builder*

*This Search Box builder is not yet updated for New VuFind.

*To build a New VuFind search box, use the builder to create a regular VuFind search box. Then email the generated code to  support@carli.illinois.edu and CARLI support will update the code for New VuFind.

- Link Builder (“The Right URL to Use”)
 - <https://www.carli.illinois.edu/buildlink/index.cgi>
- OPAC Search Box Builder:
 - <https://wro.carli.illinois.edu/boxBuilder/opac-search-box-builder.php>

■ WebVoyage- mostly frozen

■ Limited customization still supported

<http://www.carli.illinois.edu/products-services/i-share/opac/wv-cust-within-dflt-wv6>

- Recommended: Banner that appears at the top of every page
- Recommended: "Logout URL" to which users go when they click the WebVoyage "Quit" button
- Recommended: Instructions on the Patron Logon page

- Optional: Request button (add or remove)
- Optional: Type of call number search that appears on the WebVoyage Quick Search page
- Optional: Location Limit, Quick Limit options
- Optional: New Titles List button (add or remove)
- Optional: WebVoyage as an SFX "Source"
- Optional: Links to Syndetics Solutions' cover images and other record enhancements

■ VuFind 0.6 Customization Form

■ <https://www.carli.illinois.edu/products-services/i-share/opac/VuFcustom>

■ Banner/Header, Footer

■ Help Text for:

■ Login

■ Account creation page

■ Fine/Fee-paying instructions

■ Request help link

■ Other customizations to consider:

■ Colors

■ Links

■ HathiTrust

■ Syndetics

■ Reserves

■ Classic Search

■ Mobile interface

The screenshot shows a search results page for 'world cup' on the VuFind 0.6 interface. The page includes a search bar at the top with a 'Find' button, navigation links for 'Advanced Search', 'Classic Search', 'Course Reserves', and 'Search History', and a 'Your Account' link. The search results are displayed in a list format, showing book titles, authors, publishers, and call numbers. The page also features a 'Facets Now Applied' section and a 'Narrow Your Search' section. Numbered callouts (1-5) highlight specific areas of the page that can be customized.

1. Navigation link color:

Navigation hover color:

2. Feedback link (can be a url or email):

■ New VuFind Customization Form

■ <https://www.carli.illinois.edu/new-vufind-customization>

- Banner/Header
- Help Text for:
 - Landing Page
 - Login
- Other customizations to consider:
 - Colors
 - Headers/Labels
 - Links
 - Syndetics

The screenshot shows the VuFind search results page for the query 'library'. The page features a search bar at the top with the text 'library' and a search button. Below the search bar, there are suggested topics and a list of search results. The page is annotated with red circles and numbers 1, 2, and 3, indicating specific customization points.

Callout 1: Points to the search results list, specifically to the text 'Are libraries obsolete?' and 'Are libraries obsolete' in the first two results. Below the screenshot, there is a 'Link Color #1' field with a color picker set to '#XXXXXX' and a 'Link Hover Color #1' field.

Callout 2: Points to the 'Narrow Search' sidebar on the right side of the page, which includes filters for 'Location', 'Format', 'Author', and 'Language'.

Callout 3: Points to the 'Sort' dropdown menu, which is currently set to 'Relevance'.

The page also includes a 'Banner/Header' area at the top with the CARLI I-Share logo and the text 'Institution header art - Max width 940px'. There is a 'LOGIN' button in the top right corner.

- Even before UB integration, and UC loads:
 - Local catalog will contain your local data
 - Local call slip requests are possible
(if your library chose to enable them in SysAdmin)

- Users log in to their account with Last Name and Barcode.

Carl Sandburg College

Your session will expire in

[New Search](#) | [I-Share Catalog](#) | [Renew Books/My Account](#) | [New in the Catalog](#) | [Quit](#) | [Help](#)

Patron Login

Please enter your Library Borrower ID and Last Name, then click the Login button.

Note to all:
You must have JavaScript enabled in your web browser in order to place a request.

Library Borrower ID:

Last Name:

[New Search](#) | [I-Share Catalog](#) | [Renew Books/My Account](#) | [New in the Catalog](#) | [Quit](#) | [Help](#)

- User creates own identity(ies) in VuFind
- Syncing and Re-profiling
- Frequently Asked Questions about VuFind (0.6) Accounts or Logins:
<https://www.carli.illinois.edu/products-services/i-share/opac/vf-login-faq>

DEPAUL | University Library

FIND GET HELP SERVICES SPECIAL COLLECTIONS ABOUT

Mobile Version
I-Share Mobile

Keyword DePaul VuFind Catalog Find

Login
Ask a Librarian

Advanced Search | Ares Course Reserves | Search History

Login

Don't have an account in this version of the catalog?
To request or renew items, [create a username and password](#).

Username: ?

Password:

Is this a private workstation? Yes (Check "Yes" to stay logged in until you decide to log out. Otherwise the catalog will log you out automatically after 10 minutes of inactivity.)

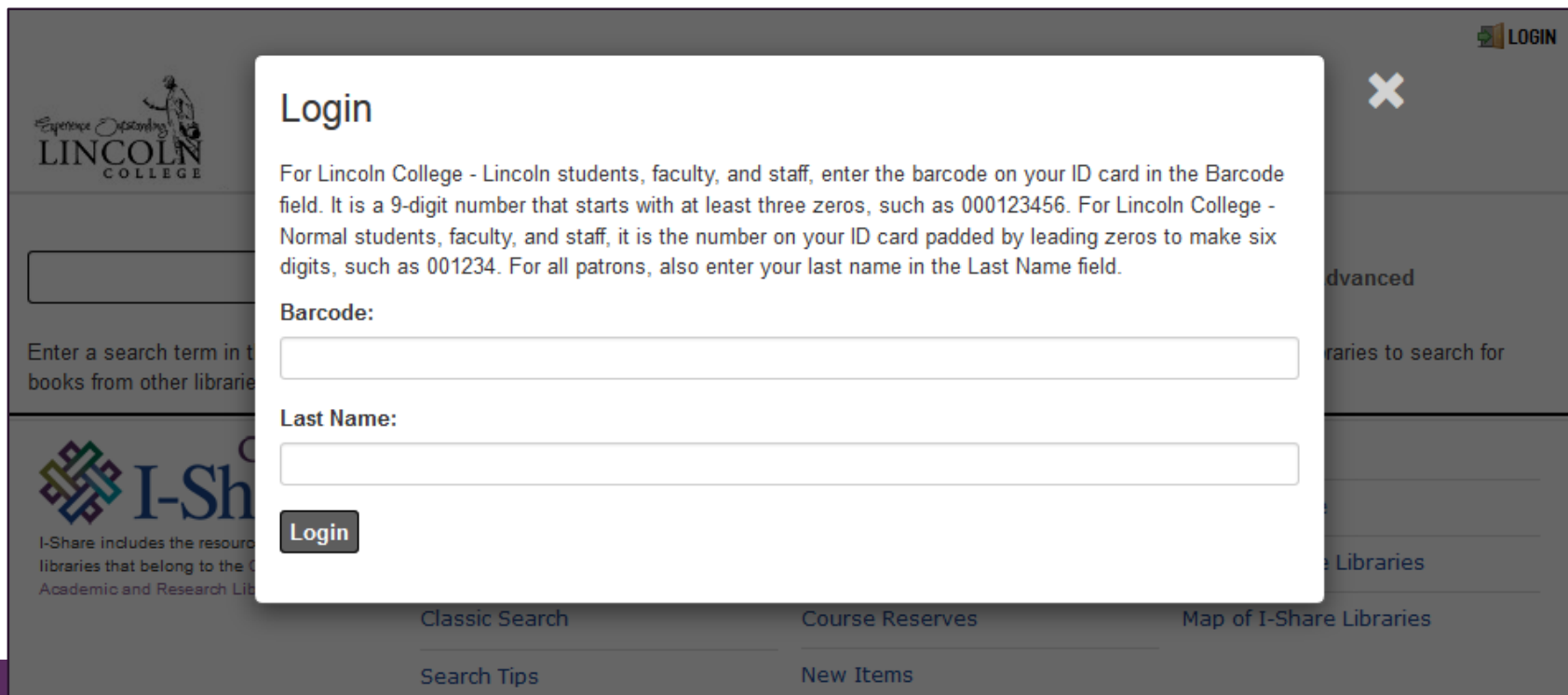
Login

[Create New Account](#)

[Forgot Your Password?](#)

[Login FAQ](#) ?

- Most users log in to Your Account with Last Name and Barcode.
- As of January 2018, users from **Millikin University, North Park University, Northern Illinois University, Southern Illinois University-Carbondale, University of Illinois at Chicago, University of Illinois at Springfield, and University of Illinois at Urbana-Champaign** log in with their campus credentials.



The screenshot shows a login modal window titled "Login" with a close button (X) in the top right corner. The modal contains the following text: "For Lincoln College - Lincoln students, faculty, and staff, enter the barcode on your ID card in the Barcode field. It is a 9-digit number that starts with at least three zeros, such as 000123456. For Lincoln College - Normal students, faculty, and staff, it is the number on your ID card padded by leading zeros to make six digits, such as 001234. For all patrons, also enter your last name in the Last Name field." Below this text are two input fields: "Barcode:" and "Last Name:". A "Login" button is located at the bottom left of the modal. The background shows a library website with the Lincoln College logo and navigation links like "Classic Search", "Course Reserves", "Map of I-Share Libraries", "Search Tips", and "New Items".

Login

For Lincoln College - Lincoln students, faculty, and staff, enter the barcode on your ID card in the Barcode field. It is a 9-digit number that starts with at least three zeros, such as 000123456. For Lincoln College - Normal students, faculty, and staff, it is the number on your ID card padded by leading zeros to make six digits, such as 001234. For all patrons, also enter your last name in the Last Name field.

Barcode:

Last Name:

Login

Classic Search Course Reserves Map of I-Share Libraries

Search Tips New Items

- Possible Request Scenarios: AAA, AAB, ABA, ABB, ABC
- Patron; Item's Library; Pick Up Library
 - AAA: Local patron; local item; pick up at local library.
 - AAB: Local patron; local item; pick up at another I-Share library.
 - ABA: Local patron; other I-Share library's item; pick up at local library.
(most common)
 - ABB: Local patron; other I-Share library's item; pick up at item's library.
 - ABC: Local patron; other I-Share library's item; pick up at third I-Share library.
- Requests from ILLINET libraries

■ WebVoyage: local catalog only



Your session will expire in 08:21

[New Search](#) | [I-Share Catalog](#) | [Titles](#) | [Renew Books/My Account](#) | [Request](#) | [Edit Search](#) | [New in the Catalog](#) | [Quit](#) | [Help](#)

Now Searching: WIU Libraries

You Searched: Any Words = cat in hat

Search Results: Displaying 3 of 2117 entries.



Relevance: ✓✓✓

Author: [Seuss, Dr.](#)

Title: The cat in the hat / by Dr. Seuss.

Series: [I can read it all by myself](#)

Published: New York : Beginner Books ; Random House, 1986, c1958.

Physical Description: 61 p. : col. ill. ; 24 cm.

Target Audience: Ages: 4-8.

Grades: PreS-3.

Reading L: 2.1.

Subject (Children's): [Cats --Fiction.](#)

[Stories in rhyme.](#)

Notes: Reprint. Originally published: New York : Random House, 1957.

■ VuFind 0.6: Local Catalog

■ If local call slip is enabled, the “Request Item” button will be visible for all items.

■ If local call slip is not enabled, the button will not be visible.

Western Illinois University

Keyword Local Catalog Only Find

[Advanced Search](#) | [Classic Search](#) | [Course Reserves](#) | [Search History](#)

[« Back to Search Results](#)



[Cite this](#)



[Email this](#)



[Add to favorites](#)



[Staff view](#)

The cat in the hat / by Dr. Seuss.

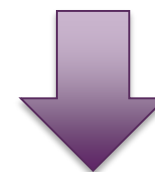
Main Author: [Seuss, Dr.](#)

Published: [New York : Beginner Books ; 1986, c1958.](#)

Series: [I can read it all by myself](#)

Topics: [Cats - Fiction.](#) | [Stories in rhyme.](#)

Tags: [No Tags, Be the first to tag this record!](#) [+ Add](#)



[More Details](#)

[Location & Availability](#)

[Table of Contents](#)

[User Reviews](#)

[Published Reviews](#)

[Request Item](#)

Western Illinois University

Location: [Curriculum Library - Horrabin Hall](#)

Call Number: [CURRLIB. 028.5 S496ca 1985](#)

[Text me this call number](#)

Copy: [1](#)

Status: [Available](#)

■ VuFind 0.6: I-Share Catalog

 Keyword ▼ All I-Share Libraries ▼

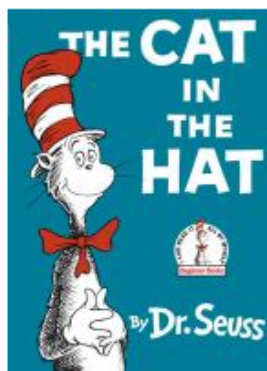
Hide eResources to which I don't have access.

[Advanced Search](#) | [Classic Search](#) | [Course Reserves](#) | [Search History](#)

[« Back to Search Results](#)

[Cite this](#) [Email this](#) [Add to favorites](#) [Staff view](#)

The cat in the hat / by Dr. Seuss.



Main Author: Seuss, Dr.

Published: New York : Beginner Books : c1985.

Series: I can read it all by myself.

Topics: [Cats - Fiction.](#) | [Stories in rhyme.](#) | [Children's stories, American.](#) | [Cats - Poetry.](#) | [Nonsense verses.](#)

Tags: No Tags, Be the first to tag this record! [Add](#)



[More Details](#)

Location & Availability

[Table of Contents](#)

[User Reviews](#)

[Published Reviews](#)

[Request 1st Available](#)

Library: Western Illinois University
Location: Curriculum Library - Horrabin Hall
Call Number: CURRLIB. 028.5 S496ca 1985
[Text me this call number](#)
Copy: 1
Status: Available
[Request this item](#)



■ New VuFind: Local Catalog

■ If local call slip is enabled, the Request Item link will be shown.

■ If local call slip is not enabled, the link will not be shown.

Western Illinois University

All Fields
Local Catalog Only
Find

[Search](#) / [The cat in the hat](#) / [Holdings](#)

[Cite this](#)
[Text this](#)
[Email this](#)
[Export Record](#)
[Save to List](#)

The cat in the hat /

Main Author:	Seuss, Dr.
Format:	Book
Language:	English
Published:	New York : Beginner Books ; Random House, 1986, c1958.
Series:	I can read it all by myself
Subjects:	Cats > Fiction. Stories in rhyme.
Tags:	No Tags, Be the first to tag this Add Tag

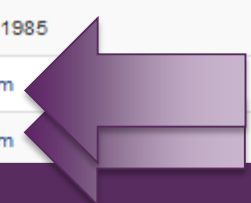
Similar Items

- [The Cat in the Hat](#) by: Seuss, Dr. Published: Random House, 1986, c1958.
- [Top Cat](#) by: E.H. Rieu. Published: Random House, 1986, c1958.
- [Kitty winking](#) by: Martin, Brian. Published: Random House, 1986, c1958.
- [Hello](#) by: Gelpi, Robert. Published: Random House, 1986, c1958.
- [Oh, the Places You'll Go!](#) by: Buehler, Robert. Published: Random House, 1986, c1958.

[Holdings](#)
[Description](#)
[Similar Items](#)
[Staff View](#)

Western Illinois University Curriculum Library - Horrabin Hall

Call Number:	CURRLIB. 028.5 S496ca CURRLIB. 028.5 S496ca 1985
Copy 1	Available Request Item
Copy 1	Available Request Item





■ New VuFind: I-Share Catalog






Holdings Description Reviews Excerpt Similar Items Staff View






Western Illinois University
Curriculum Library - Horrabin Hall

Call Number: CURRLIB. 028.5 S496ca
CURRLIB. 028.5 S496ca 1985

Copy 1 Available  Request Item


Copy 1 Available  Request Item






 Cite this  Text this  Email this  Export Record  Save to List

 Cite this  Text this  Email this  Export Record  Save to List

Kishwaukee College
Childrens Books - 2nd Floor


Call Number: PZ8.3.G278 Cat 1985






Copy 1 Available  Request Item

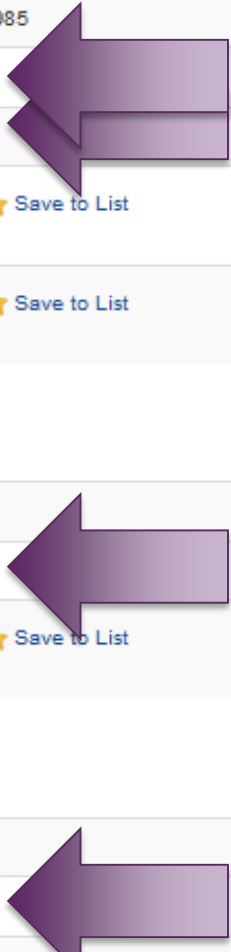
 Cite this  Text this  Email this  Export Record  Save to List

Black Hawk College
Quad Cities Curriculum Collection

Call Number: SEU CAT

Copy 1 Available  Request Item

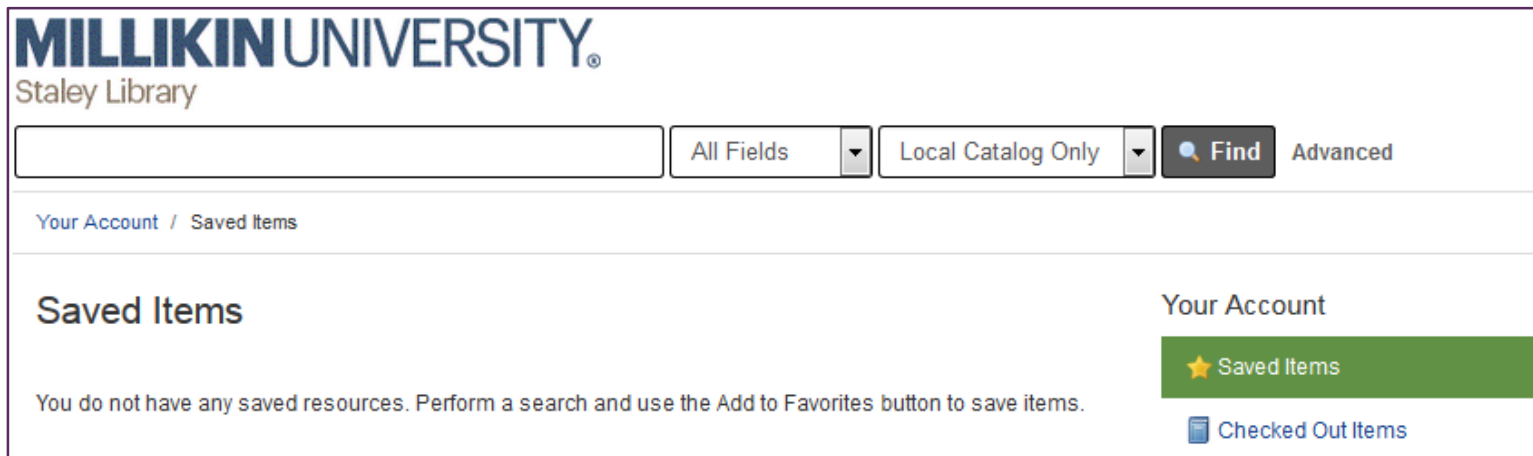
 Cite this  Text this  Email this  Export Record  Save to List



■ Favorites

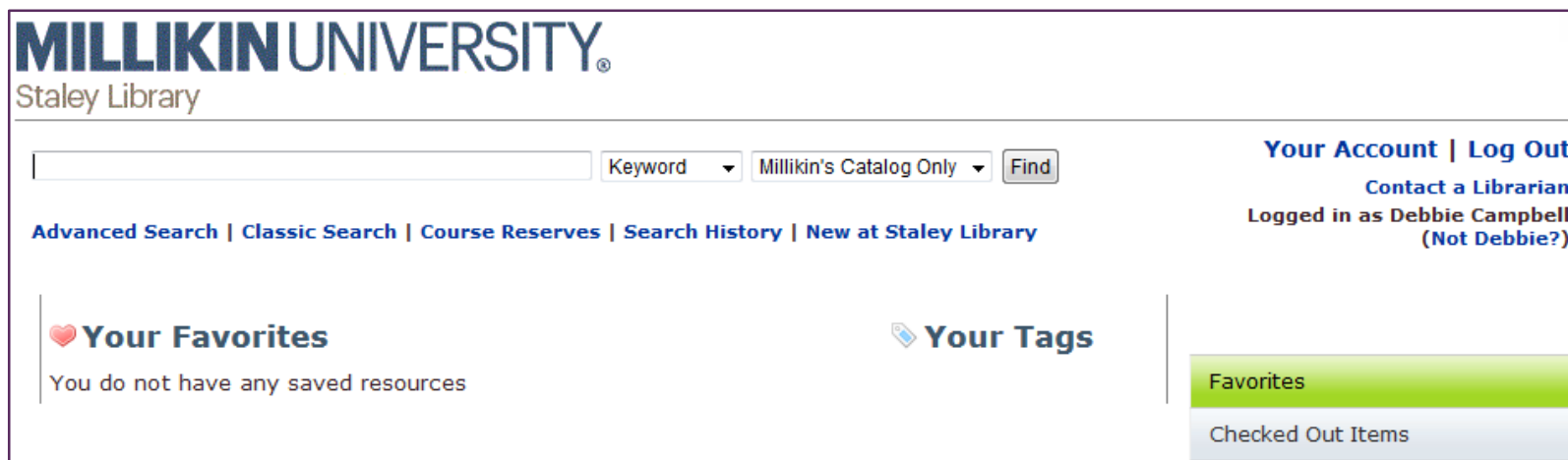
- Remember- saving items to a list does not “request” it.

New VuFind:



The screenshot shows the top of the Millikin University Staley Library website. At the top left is the logo 'MILLIKIN UNIVERSITY' and 'Staley Library'. Below this is a search bar with a dropdown menu set to 'All Fields' and another dropdown set to 'Local Catalog Only'. To the right of the search bar is a 'Find' button and the word 'Advanced'. Below the search bar, there is a navigation bar with 'Your Account / Saved Items'. The main content area is titled 'Saved Items' and contains the text: 'You do not have any saved resources. Perform a search and use the Add to Favorites button to save items.' To the right of this text is a 'Your Account' section with two buttons: 'Saved Items' (highlighted in green) and 'Checked Out Items'.

- VuFind 0.6:



The screenshot shows the top of the Millikin University Staley Library website. At the top left is the logo 'MILLIKIN UNIVERSITY' and 'Staley Library'. Below this is a search bar with a dropdown menu set to 'Keyword' and another dropdown set to 'Millikin's Catalog Only'. To the right of the search bar is a 'Find' button. Below the search bar, there is a navigation bar with links: 'Advanced Search | Classic Search | Course Reserves | Search History | New at Staley Library'. To the right of the navigation bar is a 'Your Account | Log Out' section with the text: 'Contact a Librarian' and 'Logged in as Debbie Campbell (Not Debbie?)'. The main content area is titled 'Your Favorites' and contains the text: 'You do not have any saved resources'. To the right of this text is a 'Your Tags' section. Below the 'Your Favorites' section is a 'Favorites' button (highlighted in green) and a 'Checked Out Items' button.

■ "available" ≠ requestable

The screenshot shows the library catalog interface for Meadville Lombard Theological School. At the top is the school's logo and name. Below is a search bar with the text "encyclopedia of illinois", a "Keyword" dropdown menu, and a "Meadville Lombard Catalog Only" dropdown menu. A "Find" button is located below the search bar. Underneath the search bar are links for "Advanced Search", "Classic Search", "Course Reserves", "Search History", and "New Titles". The search results section shows "Showing 1 - 1 of 1 Results for encyclopedia of illinois" and a "Sort Relevance" dropdown menu. The search result is highlighted in yellow and includes the title "Encyclopedia of Illinois.", the publication year "Published 1994", the call number "Call Number: F539 .E52 1994 Ref.", and the location "Location: Main stacks (library use only if item older than 1870)". A green dot indicates the item is "Available". The school name "Meadville Lombard Theological School" is listed below the location. An icon of a stack of books is shown with the word "Book" next to it. A red heart icon with the text "Add to favorites" is in the top right corner of the result box. Three purple arrows point to the "Available" status, the location text, and the "Add to favorites" link.

MEADVILLE LOMBARD
THEOLOGICAL SCHOOL

encyclopedia of illinois Keyword Meadville Lombard Catalog Only
Find

[Advanced Search](#) | [Classic Search](#) | [Course Reserves](#) | [Search History](#) | [New Titles](#)

Showing 1 - 1 of 1 Results for **encyclopedia of illinois** Sort **Relevance**


Encyclopedia of Illinois. Add to favorites
Published 1994
Call Number: F539 .E52 1994 Ref.
Location: Main stacks (library use only if item older than 1870)
• Available
Meadville Lombard Theological School


Book

■ "available" ≠ requestable

« [Back to Search Results](#)

 [Cite this](#)

 [Email this](#)

 [Add to favorites](#)

 [Staff view](#)

Base map of Illinois.

Main Author: [Illinois State Geological Survey.](#)

Published: [\[Springfield\] : State Geological Survey Division, 1924.](#)


Topics: [Illinois - Maps - 1924.](#)

Tags: [No Tags, Be the first to tag this record!](#)  [Add](#)

More
Details

Location &
Availability


User
Reviews

The Newberry Library [non-circulating] 

Location: Special Collections 4th floor
Call Number: map6F G4100 1924 I5 (PrCt)
[Text me this call number](#)

Copy: 1

Related Information: [Request](#)

Status: Available 

LIVE OPAC DEMO



- ... and a break, while we transition to the staff view of requesting