

VALID Customization Recommendations

VALE Reference Services Committee

December 3, 2014

In order to meet core user needs, a library catalog must help users *find, identify, select, obtain, and use* information.¹ Using these needs as a guide, the VALE Reference Services Committee offers the following recommendations for configuring and customizing the VALID user interface:

1.	Find	Users should be able to find materials corresponding to stated search criteria (i.e., to search for a single item or set of items based on their attributes)
1.1	Basic search	Relabel All Fields as Keyword
1.2	Basic search	Add Periodical Title
1.3	Basic search	Remove Tag
1.4	Adv search	Relabel All Fields as Keyword
1.5	Adv search	Add Periodical Title
1.6	Adv search	Remove Tag, Publisher, Series, and Year of Publication
1.7	Adv search	Add Library to advanced search limits
1.8	Adv search	If call numbers are not to be displayed in item records, relabel Call Number as Discipline and remove LC classes
1.9	Adv search	Remove search groups and replace match setting with Boolean operators. For example: ➤ Auburn University
1.10	Search config	Disable case sensitivity for Boolean operators
1.11	Search config	Boost relevance ranking of items where keywords are found in proximity. For example, compare the relevance of the top 10 results for the following searches: ➤ KW: industrial workers of the world vs. KW: "industrial workers of the world"~5 ➤ KW: homelessness new york vs. KW: "homelessness new york"~5
1.12	Search config	Populate autocomplete suggestions with data from title, author, and subject fields, include field in query, and execute search when autocomplete suggestion is clicked. For example: ➤ North Carolina State University ➤ Amazon
1.13	Search config	Add autocorrect for misspelled search terms and suggestions for revising 0 result searches. For example: <div style="background-color: #f0f0f0; padding: 10px; margin-top: 10px;"><p>No results found for <i>photosynthesis</i></p><p>Did you mean: photosynthesis photosynthesize photosynthetic</p><p>Suggestions:</p><ul style="list-style-type: none">▪ Check your spelling▪ Try different keywords▪ Remove any filters▪ More search tips <link to help page></div>
1.14	Error	Customize system error messages with appropriate contact info
1.15	Catalog browse	Remove Tag
1.16	Catalog browse	If call numbers are not to be displayed in item records, relabel Call Number as Discipline and remove LC classes

¹ IFLA. (1998). *Functional requirements for bibliographic records: Final report*. München: K.G. Saur. Retrieved from <http://archive.ifla.org/VII/s13/frbr/>. Note: "Use" has been added to support additional needs not covered under FISO.

1.17	Alpha browse	If call numbers are not to be displayed in item records, then remove Call Number from alphabetical browse
1.18	Alpha browse	Convert the encoded query displayed on the search results page to human language
1.19	Sort	If call numbers are not to be displayed in item records, then remove Call Number from sort options
1.20	Recommendations	Item recommendations are not always helpful <ul style="list-style-type: none"> ➤ http://validnj.org/vufind/Record/14485 ➤ http://validnj.org/vufind/Record/289836 <p>Unclear what criteria is being used or whether this is customizable. If recommendations cannot be improved, consider replacing with “Find items with the same subject” (e.g., http://catalog.lib.ncsu.edu/record/NCSU846432).</p>
1.21	Navigation	Investigate why breadcrumb link from item record back to search results occasionally fails to appear

2.	Identify	Users should be able to identify the retrieved items (i.e., to confirm that the item described corresponds to the item sought or to distinguish between multiple items with similar characteristics)
2.1	Item record	Remove Tags
2.2	Item record	Remove Comments
2.3	Item record	Merge duplicate records <ul style="list-style-type: none"> ➤ http://www.validnj.org/vufind/Record/3711 ➤ http://www.validnj.org/vufind/Record/112991
2.4	Item record	Remove or merge duplicate/redundant subject headings <ul style="list-style-type: none"> ➤ http://www.validnj.org/vufind/Record/92027 ➤ http://www.validnj.org/vufind/Record/111151 ➤ http://www.validnj.org/vufind/Record/8813 ➤ http://www.validnj.org/vufind/Record/126561
2.5	Item record	Remove foreign language subject headings <ul style="list-style-type: none"> ➤ http://www.validnj.org/vufind/Record/121362 ➤ http://www.validnj.org/vufind/Record/576358 ➤ http://www.validnj.org/vufind/Record/74359
2.6	Item record	Add format icons
2.7	Item record	List all applicable formats for an item if more than one
2.8	Item record	Add cover images and excerpts from Google Books and/or OpenLibrary <ul style="list-style-type: none"> ➤ https://vufind.org/wiki/book_previews

3.	Select	Users should be able to select from a set of retrieved items those that best meet their needs (i.e., to choose items that meet the user's requirements with respect to content, language, format, etc.)
3.1	Facets	Remove Library > Alpha Libraries from facets
3.2	Facets	Move Topics to facet column and place under Format
3.3	Facets	If call numbers are not to be displayed in item records, relabel Call Number as Discipline and remove LC classes
3.4	Facets	Allow multiple facets to be selected from the same category (e.g., <i>William Patterson</i> OR <i>Drew University</i> ; <i>DVD</i> OR <i>VHS</i>)

4.	Obtain	Users should be able to obtain access to retrieved items (i.e., to physically locate the item at the library, place a delivery request, or access the item electronically)
4.1	Item record	Display real-time holdings and availability info. To avoid performance issues, display holdings/availability on demand. ➤ http://vufind.carli.illinois.edu/all/vf/Record/1273672
4.2	Item record	Remove duplicate non-working Rutgers holdings links ➤ http://www.validnj.org/vufind/Record/585407 ➤ http://www.validnj.org/vufind/Record/265095
4.3	Item record	Add item request functionality ➤ http://vufind.carli.illinois.edu/all/vf/Record/14659854
4.4	Item record	Determine if and when to display records for licensed electronic resources. Should electronic resources be suppressed in the absence of universal access? If not, how will users determine access? If so, how do we handle free online resources or mixed print/electronic holdings? ➤ http://www.validnj.org/vufind/Record/98600 (database) ➤ http://www.validnj.org/vufind/Record/264823 (ebook) ➤ http://www.validnj.org/vufind/Record/516054 (ejournal)
4.5	Item record	Remove online designation for items that are not online. Because holdings display currently relies on links out to local catalogs, all default records have "Online Access" links even though item is not online.

5.	Use	Users should be able to make effective use of retrieved items (i.e., to save, share, cite, or export retrieved items)
5.1	Select item	Replace "Add to Favorites" with a temporary session-based cart for non-logged in users and to allow bulk actions such as save, email, export, print, and delete.
5.2	Email	Remove login as a requirement for emailing searches and results
5.3	RSS	Remove RSS option from search results
5.4	Cite	Add Chicago and AMA style citation
5.5	Save	Clarify the function of the public/private setting on lists
5.6	Account management	It is unclear if or how users will access account management features such as holds, recalls, fines, and renewals. None of these features are currently available for review.
5.7	Language	Ensure that any label changes are accurately reflected in translations of the user interface