

Reference Services Committee Breakout Discussion
VALID Summit
Alexander Library, McDonnell Room
April 4, 2104

Present: Joseph Deodato (recorder), Maria Deptula (discussion leader), Marlena Frackowski, Ann Hoang, Bruce Slutsky, Madel Tisi (discussion leader)

The Reference Services Committee was asked to address the following questions in their breakout session:

1. *What are some considerations (pros and cons?) in determining whether there should be a standard VALID interface or a customized interface, branded and developed by each VALID institution?*

The group discussed the advantages and disadvantages of both approaches, which were summarized as follows:

A standardized interface:

- Provides a common and consistent user experience across all institutions
- Requires less local technical expertise to manage (assuming it would be administered centrally)
- Minimizes variables that might otherwise make system-wide testing and troubleshooting difficult

However, a customizable interface:

- Offers a user experience optimized to meet local user needs
- Allows for more agile development (since standardization requires constant consultation and mutual consent)
- Promotes innovation and extension of the platform (since individual institutions will be free to experiment with custom solutions to both unique and common problems)

Ultimately, the group agreed that it would be advisable to have both a generic VALID interface as well as locally customized variations. The generic interface would be available to any VALE member that does not wish to customize or intends to maintain their own separate ILS interface alongside VALID. It could also be used by any users outside the consortium who wish to search VALE union holdings. However, each participating library will likely want to exercise a certain amount of local control over the configuration of their own interface. Once the generic interface is ready, the committee will review to determine how much and which features should be customizable.

2. *Please analyze the VuFind features and prepare recommendations for its configuration that optimize the FISO (find, identify, select and obtain) core user information needs.*

Find

- Some questioned whether VuFind's treatment of Boolean searching would be more or less intuitive to users. For example, using "match any/all/none" vs. traditional Boolean operators AND, OR, NOT or using "search groups" rather than nesting is different than the way we usually teach search as well as what users might be accustomed to in most of our other databases.

- Autocorrect or “Did you mean...” search suggestions would be useful for handling misspelled search terms
- Discovery can also be enhanced with the addition of a virtual shelf browsing module similar to the examples described at: <http://musingsaboutlibrarianship.blogspot.com/2013/06/a-survey-of-library-virtual-shelves-8.html>

Identify

- It was noted that some format labels such as “globe” and “kit” may not be intuitive to some users. Format icons could also be larger and more prominent to make different formats easier to identify.

Select

- In order to help users identify and select the most relevant materials, records should be enhanced with additional third-party content such as tables of content, previews, reviews, author bios, etc.
- It was noted that some records have two Rutgers holdings links, only one of which that works

Obtain

- The current demo does not display real-time holdings and availability information. Are there plans to add this in the future?
- The current demo also does not include the ability to request items. Are there plans to add this in the future?
- Citation feature should include additional citation styles (i.e., Chicago) and specify the manual edition
- Export feature should include additional citation managers such as Zotero and Mendeley

3. Should the search results default to local records or consortium records? What are the pros and cons of each decision? Is this a functionality that can be/should be determined by each VALID library?

Since one of the primary goals of the VALID project is resource sharing, it seems appropriate to show consortium records by default. However, not all resources can be shared. This is especially true in the case of electronic resources where it doesn't make sense to show consortium records since not all users have access to these resources. Furthermore, users will likely prefer to see locally available materials by default with the option to expand their search to other libraries. However, item request functionality must be in place before consortium records can be usefully deployed.