VUFIND: THE MNPALS EXPERIENCE

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Goals

- Learn about...
  - the basics of the open source VuFind project and the functionality of the search interface
  - the MnPALS Consortium’s implementation of VuFind (MnPALS Plus)
- Discuss...
  - the challenges in adopting a new search paradigm
What’s in it for you?

PALS librarians will...

- walk away with a greater understanding of MnPALS Plus
- feel more confident using Plus and understanding search results
- be better able to advocate for it within their own institutions

Everyone else will...

- learn about the possibilities and potential of VuFind
- see how favorably it compares to its expensive competitors
- be able to advocate for it within their own organizations
An outline

- Musings about OPACs
- An Introduction to VuFind
- MnPALS’s Implementation: Plus
- A Quick Comparison of Tools
- The Road Ahead
Let’s head back to 2006…

- Well-known blogger Karen Schneider publishes her manifesto, “How OPACs Suck”
- Google, Amazon, IMDB use relevance and return the “best” matches first
- When one compare these tools with library OPACs, it’s obvious that they “suck”
So what should OPACs have?

- OPACs should have the following features:
  - Relevance ranking
  - Stemming
  - Field weighting
  - Spell checking
  - Refine original queries
  - In-line query limiters
  - Duplicate detection
  - Sort flexibility

- Support for popular search operators
  - Quoted phrase searching, wildcards, and proximity searching
  - Faceted searching
  - Advanced search page
  - Customizable search result pages
  - “Best bets”
  - Search logs
  - Administrative interface
Karen’s vision

- Standards-compliant Web services
- “Dis-integrated” from the ILS
- Use of global records, not local
The MnPALS OPAC sucks

- Meets only some of Karen’s criteria
  - Relevance ranking (supposedly)
  - Refine original queries
  - In-line query delimiters (buried)
  - Sort flexibility (confusing)
  - Support for popular search operators (partially)
  - Quoted phrase searching, wildcards, and proximity searching
  - Search logs
Seven months later (January 2007)...

- MnPALS Consortium of Libraries’ User Council establishes the Discovery Tool Task Force to:
  - “survey and assess available opportunities (and interests) in implementing discovery tools to enhance user’s experience”
Consortium survey

- Consortium libraries were surveyed as to what “discovery tool” they wanted first.

- Top three results:
  - Catalog enhancement
  - OpenURL resolver
  - Federated search
Twenty month later (August 2008)...

- MnPALS launches MnPALS Plus, an open source “discovery tool” based on VuFind.
What is VuFind?

- Open source resource discovery portal for libraries
- Purpose: To provide a single interface for all library resources
  - Homepage
  - Catalog
  - Articles
  - Digital libraries
  - Etc.
- Licensed under the GNU Public License (GPL)
- Released as an open source product on June 20, 2007
Who developed VuFind?

- The Falvey Memorial Library at Villanova University, Villanova, PA
What’s in it for users?

- Faceted search results
- Live item status and location information
- Covers
- Text item information to phone
- Citation generator
- RSS syndication
- “Similar items” suggestions
- Save resources for later
- Author biographies (via Wikipedia)
- Persistent URLs
What’s in it for librarians?

- Easy branding and other customization
- Search features
  - Stemming
  - Popular query operators
  - Phrase searching
  - Wildcards and proximity searching
- Search results
  - Facets
  - Flexible sorting
- Easy search box code for the library website
- No support fees!
What’s in it for the techies?

- Integrates with major ILSs, including Aleph, Voyager, SirsiDynix, and Innovative
- Tweak-able relevancy algorithm and field weighting
- Performance and scalability: Uses the Apace SOLR search engine
- OAI syndication
Web 2.0 features

- Tagging
- RSS syndication
- Reviews (pulled from Amazon.com)
- User comments
Demo

- Let’s see it already!
MnPALS Plus adoption

- Minnesota state universities
  - Metropolitan State University (beta, link to Classic)
  - Minnesota State University, Mankato (link to Plus)
  - Minnesota State University, Moorhead (link to Plus)
  - Southwest Minnesota State University (links to both)
MnPALS Plus adoption

- Minnesota consolidated, community and technical colleges:
  - Central Lakes College (switched)
  - Dakota County Technical College (switched, link to Classic)
  - Fond du Lac Tribal & Community College (links to both)
  - Hibbing Community College (switched)
  - Minnesota West Community and Technical College (links to both)
  - Minneapolis Community and Technical College (switched)
  - Riverland Community College (links to both)
  - South Central College (links to both)
  - Vermilion Community College (link to Plus)
MnPALS Plus adoption

Minnesota private colleges and universities:

- Bethany Lutheran College (switched)
- College of St. Benedict/St. John's University (WorldCat Local, link to Plus and Classic)
- Concordia College (switched, link to Classic)
- Gustavus Adolphus College (link to Plus)
- Minnesota School of Business/Globe University (switched)
- St. Mary's University (switched, link to Classic)
The word has spread...

- On January 16, 2009, PALS announced it will provide a VuFind implementation for North Dakota’s ODIN library consortium
- PALS office has also received inquiries from the South Dakota Library Network
Usability testing

- Concordia and Minnesota State Moorhead
- Planned: Gustavus Adolphus, Minnesota State Mankato, St. Cloud State
- Will be ongoing throughout the consortium
Usability testing

- **Purpose**
  - To observe how well the MnPALS Plus interface responds to users conducting common tasks
  - To identify possible improvements to the interface

- **Methodology**
  - Only a small set of test users is necessary
  - See “Why You Only Need to Test With 5 Users” at <http://www.useit.com/alertbox/20000319.html>

- **Results**
Challenges

- A new search paradigm
  - The faceted, “discovery portal” philosophy
  - Boolean (matching) versus Google (relevance)
  - Stemming
Relevancy algorithm

- Weighted toward titles
- Easy to change
- Example scoring and ranking
  - Exact title match: 1000
  - Title starts with match: 750
  - Title includes all words: 100
  - Exact author match: 700
  - Author includes all words: 100
  - Exact topic (subject) match: 750
  - Etc.
How does VuFind compare with Karen Schneider’s list?

- It includes almost everything!
  - Relevance ranking
  - Stemming
  - Field weighting
  - Spell checking (will be implemented)
  - Refine original queries
  - In-line query limiters
  - Duplicate detection
  - Sort flexibility

- Support for popular search operators
- Quoted phrase searching, wildcards, and proximity searching
- Faceted searching
- Advanced search page
- Customizable search result pages
- “Best bets”
- Search logs (not yet)
- Administrative interface
VuFind, WorldCat Local, and Endeca

- VuFind (MnPALS implementation): August 2008
- VuFind (open source release): June 20, 2007
- WorldCat Local (pilot): April 2007
- Endeca (implementation at NCSU): January 12, 2006
# How does VuFind compare with WorldCat Local and Endeca?

<table>
<thead>
<tr>
<th>Criteria</th>
<th>VuFind (Plus implementation)</th>
<th>WorldCat Local</th>
<th>Endeca (NCSU implementation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search by call number</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Spell check</td>
<td>In progress</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Similar items</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
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<tr>
<td>Citation generator</td>
<td>Needs work</td>
<td>Yes</td>
<td>No</td>
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<tr>
<td>Citation export</td>
<td>In progress</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Search syndication (RSS)</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Tweak-able relevancy algorithm</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Tagging</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Open source</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Text to phone</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Usage statistics</td>
<td>No</td>
<td>Yes</td>
<td>Presumably</td>
</tr>
</tbody>
</table>
Observations

- Several common characteristics
  - Integrate/interact with local ILS to varying degrees
  - Live item status
  - Faceted search
  - Browse by LOC class
  - Book covers
  - Reviews and/or user comments

- Mobile functionality
  - WorldCat announced mobile pilot (January 2009)
  - NCSU provides mobile view
  - Have not tested VuFind
VuFind: Strengths and weaknesses

- Weaknesses
  - Not “polished”
  - No usage statistics

- Strengths
  - Web 2.0
  - Flexibility and adaptability
    - Open source
    - Not proprietary
MnPALS Plus: The road ahead

- Statistics
  - “VuFind needs the ability to record statistics on various user actions to generate useful statistics reports.” (from the VuFind development page)
- ILLs do not display in account
  - Issue with Ex Libris
- Developing a RefWorks port
- Better FAQ and tutorials
- Assessment
  - Increased access?
  - High circulation rates?
  - Etc.
A big thank you!

- Al Rykhus
  - PALS information systems developer and integrator
  - Send technical questions to him! <alan.rykhus@mnsu.edu>

- Discovery Tool Task Force members
  - Alec Sonsteby (Chair) – Concordia College, Moorhead
  - Jennifer DeJonghe – Metropolitan State University
  - Travis Dolence – Minnesota State University, Moorhead
  - Adam Marsnik – Normandale Community College
  - Melissa Prescott – St. Cloud State University
  - Evan Rusch – Minnesota State University, Mankato
  - Perry Madden – PALS

- MnPALS Consortium of Libraries User Council
  - The libraries testing and using MnPALS Plus
  - Ginny Connell, M.S. LIS intern at Concordia College, fall 2008
To learn more...

- VuFind: <http://www.VuFind.org>
- MnPALS Plus FAQ: <http://www.mnpals.org/sections/mnpalsplus.html>
- Try out Plus at <http://plus.mnpals.net>
Questions?

- Any questions?
- Send technical questions to Al Rykhus <alan.rykhus@mnsu.edu>
- Send inquiries about the possibility of a PALS implementation of VuFind for your institution or consortium to Stephen Elfstrand, PALS executive director <stephen.elfstrand@mnsu.edu>
Thank you

- Alec Sonsteby
  - Before May 9, contact at Alec at <sonsteby@cord.edu>
  - After May 9, contact Alec at Metropolitan State University