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
- Fext 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

- > 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
 - X Spell checking (will be implemented)
 - Refine original queries
 - x 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
- x "Best bets"
- x 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?

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

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
- Fry 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

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