Background:

The Minnesota Historical Society Library (MHS) went into production on the Aleph system as a Gamma library in early March 2004. Since that time several staff have been involved in investigating and reporting issues related to the Web OPAC. In fact, we have formed an in-house Web OPAC task force comprised of reference and cataloging staff. Additionally, MHS has compiled a list of OPAC problems that is updated as new problems are discovered. This spreadsheet of problems is sent periodically to the Aleph Migration list. We also have representation on the MnPALS Access Task Force.

Web OPAC problems and recommendations for improvement have existed since the first libraries came onto the system. Some were identified by the former HTML Customization Group. They are currently being reported and investigated by the MnPALS Access Task Force. Individuals also send in problems either through the Aleph Migration List or to PALSHELP. This process has resulted in duplication of problems reported as well as problems being tracked in various places. Currently there are 11 libraries migrated to the MnPALS Aleph system. It is reasonable to expect that the reporting of problems and requests to fix them will grow exponentially as more and more libraries are migrated (the total number of libraries is expected to be about 156, with 70-80 separate ADMs). Ongoing changes to system architecture and cataloging rules will require adjustments to the Aleph Web OPAC.

A Sample of Currently Identified OPAC problems:

** Note that this list serves to illustrate the scope of the problems and is not meant for point by point discussion. The list is not complete, nor are the problems fleshed out as completely as they could be. Following this list are proposals and discussion points to be addressed during the user group meeting.

1. Totally dysfunctional Libraries and Collections page for MnPALS union view and for all upcoming libraries (revision underway by MHS staff and on the agenda for review by the MnPALS Access TF).
2. A search query is only repeated on the initial search results screen; when you select a record, your search query is not displayed with the record as it was in WebPALS. If you have questions about the records you retrieve as a result of a search, it helps to have your search query with the record for reference.
3. Highlighting of search terms is abysmal. Terms that are used in a search are highlighted throughout a record. Though there are many display problems associated with this issue, some specific problems include the highlighting of
words that are specified in a Not (Boolean) operation; the highlighting of words that appear in fields that were not specified by the search type; the highlighting of title words throughout a record when a call number search is performed; the highlighting of individual words appearing anywhere throughout a record that were specified in a phrase search; the seemingly random application of highlighting to stop words; the highlighting of compound words; and the addition of highlighting to words from filter queries.

4. Browser back button does not work to exit catalog and go back to the entry point of the researcher. (MHS receives ongoing complaints of this from researchers who access the catalog via the MHS Web site).

5. All of the Search Hints for both the basic and each advanced search page should be reviewed and improved. Additionally, the Search Hints information should be coordinated with the information given when you select “HELP” from the upper right corner. The Help information also needs to be reviewed and improved/corrected.

6. CCL searching is offered with no example of the syntax for this type of search. This leaves a researcher who would like to try this kind of search helpless. The help here is poor also.

7. Mouseovers for logos such as MnPALS or Minnesota Historical Society should indicate the action of the click, not the identity of the image (e.g. instead of “MnPALS logo” and “MHS logo”, how about “Connect to MnSCU/PALS Homepage” or “Connect to Minnesota Historical Society Homepage”).

8. Related Search Services windows should be reviewed and revised. They currently contain language (e.g. Services AUT) that is meaningless to a researcher. (This issue is on the agenda for review by the MnPALS Access Task Force).

9. On the Basic Search page, when the search box for the Browse Search was combined into one box with the Keyword Search, the option to Search as a Phrase was lost (it is available on the Advanced Search Page).

10. It has also been discussed that “Browse” be added at the beginning of the searches that indeed are Browse Searches - e.g. Browse Titles Beginning With …; Browse Authors Beginning With …; Browse Subjects Beginning With …; and Browse Call Numbers Beginning With …. This would more fully delineate for researchers the difference between a Keyword Search and a Browse Search. The fact that the non-keyword search actually is a browse search has been lost. (MHS has not yet reported this as part of our response to the recent changes to the Basic Search page).

11. The ellipses in the Select Search drop down are selectable and operational, but do not generate an error until after an ellipsis has been selected. (Discovered by MHS but not yet reported.).

12. Search examples should be keyed with mouseovers so that as a researcher places their mouse over a particular search type, the search hints change respectively. This would aid the researcher in determining which type of search to use.

13. Something is amiss with Boolean searches. MHS tried using the example that was originally given in the Boolean search hint on the basic & advanced pages: "(heart OR cardiac) AND surgery." When that example was used in a basic search
query, the placement of parentheses in the returned query had been revised as indicated by the query that was returned on the results page: "Results for Words=(heart OR cardiac AND surgery)." Of the total 515 records, the first 23 did include the word "heart;" however, the word "surgery" was not included. As constructed and as suggested by the search hint, the query should have only returned records that also contained the word "surgery." We tried this search again using the query "heart or cardiac" which returned 523 records. We then revised those results adding "surgery" as an AND operation through the Revise page. This set netted only 5 hits that correctly matched the search criteria.

Using the Advanced Search Multiple Fields query by typing “heart” in the first search box, “cardiac” as an OR operation in the second box, and “surgery” as an AND operation in the third box netted 515 hits. However, when the query is constructed with "heart or cardiac" in the first search box and "surgery" in the second box the search netted the 5 hits that correctly matched the search criteria.

Using the common command language query "wrd=(heart OR cardiac) AND wrd=surgery" also only netted 5 hits.

The Aleph 500 Web guide (OPAC (Web), System Librarian section) states "In search statements with only AND and OR, the Boolean operations are evaluated from left to right. Operations in parentheses are evaluated first." Not true. In the case of the basic search, and in the case of the Advanced Search when the query was parsed into three search boxes, the query was evaluated in a different manner. Again, the available help is sorely lacking.

14. Labeling is not consistent. When you are in the MnPALS Union Catalog you have an Advanced Search option for Multiple Libraries, but if you click on it, the title then displays as: Advanced Search: Multiple Databases. Under the Multiple Fields option (individual catalog or union catalog), the Field to Search list includes “PALS Bib ID”, but under Advanced Browse, this is listed simply as PALS Number.

15. Changes made to the MnPALS Union Catalog are not applied to the individual library catalogs. In the Union Catalog, “Advanced Search: Multiple Fields” has been changed to read “Advanced Keyword Search: Multiple Fields” to define the type of search you are doing, but this change was not made to the individual library catalogs. Also in the Union Catalog on the Multiple Fields page the 3 radio buttons used to Search as Phrase now work independently, but in the individual catalogs if you use a button on one line, then use one on the next line, the first selection goes away.

16. Choices appearing in the dropdown menu for Advanced Browse all need review. For example there are choices for ISSN and ISBN, and also for ALL ISSNs and ALL ISBNs. What is the difference between these choices? What does Standard Identifiers search? Do we need choices for MESH headings and NLM call numbers if no one in the consortium uses them?
17. For searches that generate results over 1000 records, the screen will say that the results are not sorted. And although the screen might say your results are “Records 1-10 of 2736”, Aleph has actually generated a sub-set of 1,000 out of the total result of 2736 records, a sub-set that appears to be selected by the most recent date the catalog record was entered into the system. It doesn’t say anywhere that this sub-set has been made, but if you try to jump to record 1001, you get a message that you exceeded the number of records in the set (placement of message doesn’t stand out very well). If you select Help and go to Search, the second paragraph says, “The Search function will retrieve a maximum of 2000 records per set. If your search request finds more than 2000 records, you will be requested to rephrase your search term.” However, our maximum retrieval is only 1,000 and you aren’t asked anywhere to rephrase your search terms nor are you directed to the Revise function or to the Basic or Advanced search pages. Furthermore if you were to try to apply filters to this search, the question arises whether the filter is applied to all 2736 records or to the sub-set of 1,000 which could further skew your results.

18. The Filter page and each option on it need to be reviewed to determine how the searches work. Wording needs to be rewritten for clarity. Is filtering by year using publication dates, or by the “records created from” date, which could be different from publication date? The options for “Refine ab” and Filter-heb” and “wyr-1980-2000” are even more problematic. Does the average staff, not to mention the average researcher, have a clue to what these mean? Each of these brings you to a common command language screen with no information about what you are supposed to input where. For instance “Filter-heb” appears to be a language filter and it is preset with “heb” for Hebrew, but no list or link to a list of language abbreviations is given, not to mention an accurate listing of common command language terms since WLN isn’t in the list in the Search Hints or on the Help page. Shouldn’t the Filter page say for this option: “Filter by Language” instead of “Filter-heb”? Could there be a user-friendly interface applied to these searches with the “SET=078101” and command language terms applied behind the scenes? (The problems with the predefined filters were reported to PALS and in February 2004 acknowledged by PALS as being on the HTML Customization Task Force’s high priority list. The MnPALS Access Task Force has not yet addressed these problems).

19. Hyperlinks should be reviewed. Currently they are highlighted in Red. Then you also have the search terms highlighted in Black. Once a hyperlink is clicked, the color fades, resulting in a fourth color in the record. This display is confusing and thus meaningless. In addition to the red highlighting, hyperlinks are also preceded with a bullet. The screen is too busy. Bullets are not a Web standard for identifying hyperlinks. Perhaps they should be underlined instead. Is red typeface compliant with ADA standards?

20. When you view a record from the Results List, and then go back to the Results List, the record you reviewed becomes the first in the display group. So instead of consistent groupings of 1-20, 21-30, 31-40, if you choose item 18, the groupings are now 18-27, 28-37, etc.
21. We have discovered that when you Browse call numbers or authors, a call number or author name may not appear on your results list, however if you go to the previous or next page and then return to the original results page, suddenly the call number or author name is in the results list. We have a sense where this happens but we aren’t sure why this happens, and we have not fully tested all indexes for other occurrences of this bug. (This has been reported to PALS.)

All of the problems listed above and those yet to be identified need to be changed in the MnPALS Union view, each individual library’s view, and also in the Z39.50 view. The Z39.50 presents its own set of unique problems – not all searchable fields are displayed in a record and the Help is abysmal. It provides help for features that are not even offered in this view.

Proposal:
As we brave this new frontier of Alephland, we are wondering if we need to develop a new way of conducting business. Many libraries’ staffs have been squeezed down due to budget reductions, as is also true for the PALS staff. We think the MnPALS Access Task Force is a great idea, and that it should become a permanent subgroup of the Reference User Group, similar to the Database Quality Management Task Force of the Cataloging User Group. The User Council recently extended the deadline of the MnPALS Access Task Force to April 2005. But with the server upgrading to version 17 in Summer 2005, the Task Force may be needed to deal with issues that arise out of version 17, as well as future upgrades and continuing interface usability issues. Therefore we propose:

a) The MnPALS Access Task Force should be formally established with representation of the various types of libraries that constitute PALS. In the future, representatives should be elected by the membership and serve specific terms.

b) Web OPAC problems and recommendations should/must be funneled through one of the Task Force members.

c) A spreadsheet of all problems and recommendations (those recommendations agreed upon by Task Force or User Groups) ever reported about the OPAC should be created and maintained on the PALS Web site for all to read (with perhaps write capabilities for members of the Access Task Force so that they may record new problems as they are identified).

d) Anyone reporting a problem or making a recommendation should/must check the spreadsheet (it will be searchable) to be sure it has not already been reported.


e) The spreadsheet will contain the following information for each problem/recommendation (via TF or UG action): Date the problem/recommendation was reported; Who reported it; Description of the problem/recommendation; PALS staff member responsible for follow-up; Resolution of the problem/recommendation and date (or why it cannot be resolved); To which views of the catalog the fix was made. We are currently aware of the following views of the catalog – 1) Web OPAC from the library’s home page, 2) MnPALS Union View, 3) a specific library’s catalog chosen from
the MnPALS drop down menu, 4) Z39.50 view of the OPAC for individual libraries (chosen from the Libraries and Collections page), and 5) the GUI Client.

To prevent repetitious reporting of problems, each problem should be fixed in all of the views of the catalog. Check-off columns would be added to the Web OPAC spreadsheet so that changes to all of the views can be recorded.

Discussion Points:

1. If we do not develop a centralized and organized approach to dealing with all of these issues and tracking results, staff will eventually burn out and not want to participate in the improvement/evolution of the OPAC.

2. Additionally, a system to report changes made to the OPAC, changes unmade to the OPAC, or changes under proposal for the OPAC needs to be created and used.

3. If we do not develop an organized approach to all of the Web OPAC changes, we will be discussing the same things over and over. No one has time to do this. First, maybe the User Group should decide on an overall philosophy for tackling interface design. Do we aim to educate users via the interface (by way of examples and help information), or do we want to adopt an existing model that many users are familiar with (e.g. Google)? And a second point for the User Group to consider is how much an individual library's catalog interface can vary from the MnPALS Union Catalog view (e.g. structure, examples/content).

4. The problems reported above each take significant time to investigate, document and report. It is not unusual for additional problems to be discovered when investigating one particular issue. This is all very time consuming for staff that are already pushed to the limit of their workdays. Since the Aleph out of the box product will require so much work to bring it to a professional level user interface, would a better approach be to hire a consultant to do all of this clean up work that really should have been done by the vendor before they delivered the product as production ready? Perhaps there could be some leveraging in final contract negotiations to cover the expense ofremedying the OPAC as well as the problems of the GUI client (these are being presented in the Cataloging User Group).

5. Are there enough PALS resources to deal with these problems, in addition to dealing with migrating libraries and libraries still using old PALS? If not, are we just wasting our time here? Should the UC or DDC be approached to find additional funds to support such a position? How does the proposal for a single AlephE in v.17 affect this?