Welcome, introductions, and designate scribe

Graham Dostal, Tinley Park
Molly Bitters, Eisenhower
Tony Lucarelli, Indian Prairie
Susan DeRonne, Glen Ellyn
Diana Rusch, Tinley Park
Dave Pacin, SWAN
Joseph Miller, SWAN
Scott Brandwein, SWAN
Dawne Tortorella, SWAN
Tara Wood, SWAN
Aaron Skog, SWAN (notetaker)

A Brief History of the SWAN OPAC (since October 2018, the last DUX meeting)

Tara reviewed Enterprise configuration work since October 2017, our last DUX meeting.

The SWAN Enterprise production upgrade to v5.0.0 is planned for March 2018. Enterprise harvesting is upgraded and our testing shows improvements in the length of the harvest. The Enterprise harvesting issues SWAN encountered last year were primarily eRC harvest problems with Hoopla. SWAN was experiencing ~25 eRC Hoopla harvests of ~500,000 records. These were consolidated into a single harvest through some special work by SirsiDynix software engineers. The harvests have since been running smoothly.

SirsiDynix explained at the November SLUI meeting (at Indian Trails) that 5.0 was a huge development project and it included a lot of back end changes to Java, Web Services.

Molly outlined the way trigrams work in Enterprise, and was wondering if future releases of Enterprise will improve the trigram approach. Examples used were Virginia Woolf versus Virginia Wolf. The SirsiDynix product roadmap indicates an update to the latest version of Solr, which should improve searching.
Enterprise v5.0.0/Mobile Preview

Mobile preview with Enterprise v5.0.0 is not fully responsive design ready for production. The mobile preview is part of SirsiDynix’s approach with v5.0.0 with the full responsive design expected for v5.0.1. The mobile theme appears to be ready, but the non-mobile pieces of it are problematic in v5.0.0. The filter functionality is not working properly and SWAN is going to see if this gets worked out.

Enterprise v5.0.1 is slated for Q2 2018 (March – June), which SWAN will continue to plan for within the New 19 project timeline and the transition to our cloud infrastructure.

Edition Statement on Enterprise Search Results

This field display was added in December 2017, as part of the evaluation of Enterprise by the New 19 Enterprise Task Force. This is coming from the MARC 250 field. If library staff see anything odd in the Edition field, open a SWAN ticket for Bibliographic Services to look at.

Excerpt on Enterprise Search Results

Tara would like to hide the “excerpt” field listed on the search results, but wanted to discuss this with DUX. Should we rename this instead? DUX reps noted this will display the music song title, or the call number, or the poem title from an anthology. Removing it from the display will not remove the ability to search those fields, however. It will simply remove the Excerpt line from main search results display, and will still include searchable information found in the detail display.

What should we name it?

- Match terms
- Match phrase
- Can it be named after the field where it matched?
- Keywords
- How did I get here? How did this match?
- Search match

What about a classic DUX 10 second survey? Joseph and Tara will design a survey for library feedback. This survey should be completed prior to the next DUX meeting.

Analytics Implementation on Enterprise

Google Analytics in Enterprise is being revamped by Tara. Once you make filter changes in Analytics, you only get those changes moving forward, not for data that was collected in the past. Her goal is to make this data more easily shared with DUX for feedback. Tara demonstrated some of the Google Analytics data, which shows some of the Advanced Search hits, counts per library profile, sessions by day of the week, and sessions by hour of the day.

Tara will add “event tags” to begin to count clicks on search limit facets and other areas of search. This requires work beyond the out of the box Google Analytics that SD provides within the Enterprise Admin interface. Stay tuned!
New 19 Enterprise Task Force

The meeting at Downers Grove included a “gut test” on a number of catalog and website home pages. Those were tallied and the top pages were discussed by the group. The results deviated from expectations slightly, but not by much.

Series information in Enterprise

The dropdown search menu was updated across the SWAN Enterprise production environment, so it is now live for all libraries. The series information is now displayed on search results, and the display is being worked on by Tara. SWAN created a new MARC map for the series display and implemented some CSS features to clean up the series title display. Feedback and issues should be sent to SWAN via a help desk ticket.

Wireframes Prepared by SWAN UX Manager

Tara reviewed several layouts and displays of Enterprise she created within Axure, a tool for designing interfaces/web page mockups. It has some interaction within the interfaces, but it is not fully functional. These mockups will be shared with DUX for feedback.

Tab search
This tabbed search design has “Print & Media”, “eBooks & Streaming”, “Articles” with a different set of filters depending on the tab of results clicked on. Fiction/Nonfiction would not be part of the eBooks & Streaming tab, since it is not applicable.

This design has the “sticky search box” which would be persistent throughout scrolling through results. The idea is to allow patrons to quickly perform a new search once they reach the bottom of the search results page.

Request form
This menu is labeled “Request for Purchase” which would display a form that patrons could fill out, with patron information pre-populated in the form if they were logged into the system.

Footer
The footer of the Enterprise pages would be part of a proposal to SirsiDynix, which would contain information on the Enterprise home page, so it would be at the bottom of every Enterprise search results page.

Enterprise “Only Show Available” Button/Feature

SWAN received a ticket requesting the “Only Show Available.” This setting is only available as an option for all of Enterprise, it cannot be by profile. The reasoning is to find an item that is immediately available, specifically in-house. Some patrons will phone the library to make sure the item is on shelf.

SWAN staff would like to continue this work with DUX via email, with some research into the local library limits and available items.
A Little Design Exercise

Tara and Joseph provided scoring sheets for all of DUX, and on a scale of 1 to 5 the various search pages of websites was reviewed and rated. These were not solely library catalogs, but the Enterprise examples were from other libraries, and any SWAN member libraries’ Enterprise were made anonymous.

Top ranking within DUX exercise:

1. **Etsy**: lays out the breadcrumbs of the limits used very clearly; focused on the grid layout
2. **Enterprise SWAN’s “gray theme”**: this has strategic use of colors, is a little text heavy
3. **Best Buy**: which looks a lot like Enterprise! this does not have the include/exclude buttons all items tab, “pick up today” tab (“Available this Second”)
4. **Enterprise Kids Profile**: this is using a grid, which is similar to the Etsy layout, still concerns about the top-right menu icons (pizza, “scary things”, soccer balls, etc.)
5. **Patagonia**: this is very minimal, allowing the items returned in results to provide all the color, photos are just the right size, no real “distractions”

To do list from Design Exercise

- Tara will make the “place hold” text on the search results button larger.
- Joseph will share the search pages and the scoring sheets with DUX, so if they wanted to try this within a department meeting, they could. The importance of this is the discussion as to “why” the ranking occurred.
- Remove the “request from another library” in the request form.

**General discussion of relevant topics**

New Topics?

**Next meeting:** February 22, 2018, 1:30–3:30