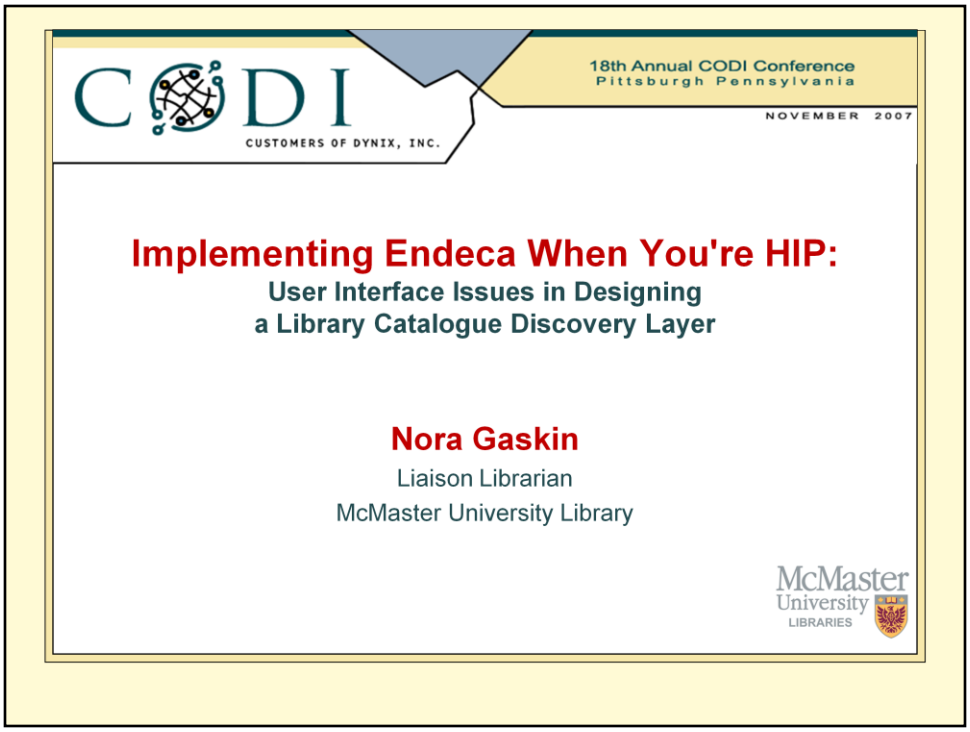
November 2007

Implementing Endeca When You're HIP



• Many thanks to Amanda Etches-Johnson, who generously allowed me to use her presentation:

Forget the Lipstick, this Pig Needs a Complete Makeover (presentation on McMaster's Endeca-powered OPAC), Access 2007, Victoria, B.C., October.

http://www.blogwithoutalibrary.net/?p=286

…as the starting point for this presentation. Thanks, Amanda!

CODI
CUSTOMERS OF DYNIX, INC.

18th Annual CODI Conference
Pittsburgh Pennsylvania
NOVEMBER 2007

Outline

- **why and how**
- before & after
- issues, choices, lessons
- what our users think
- future plans

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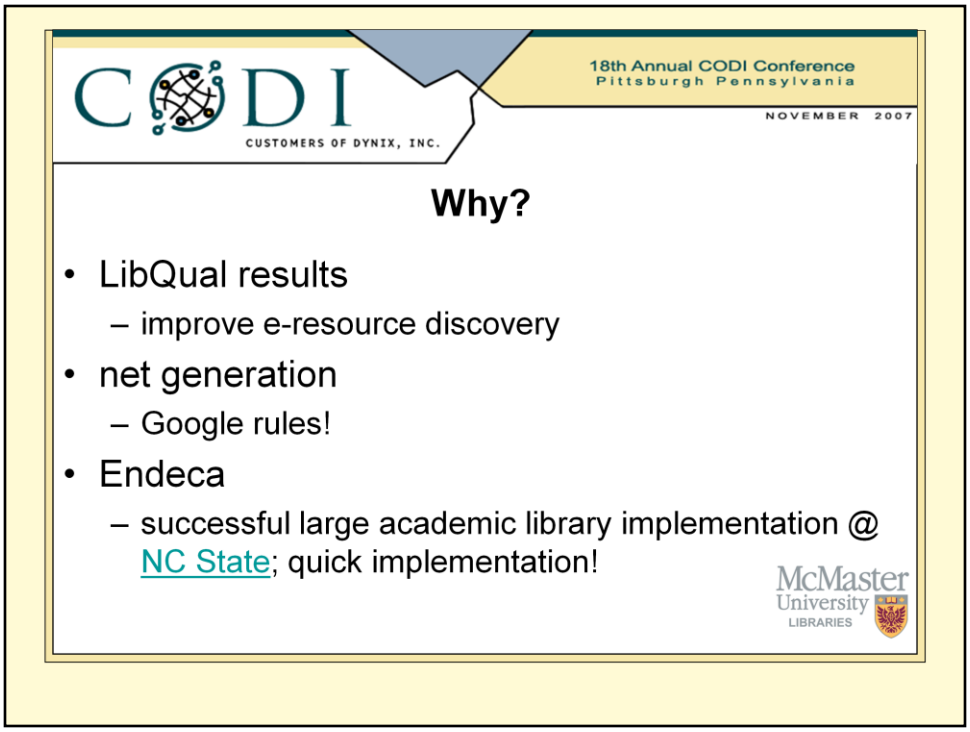
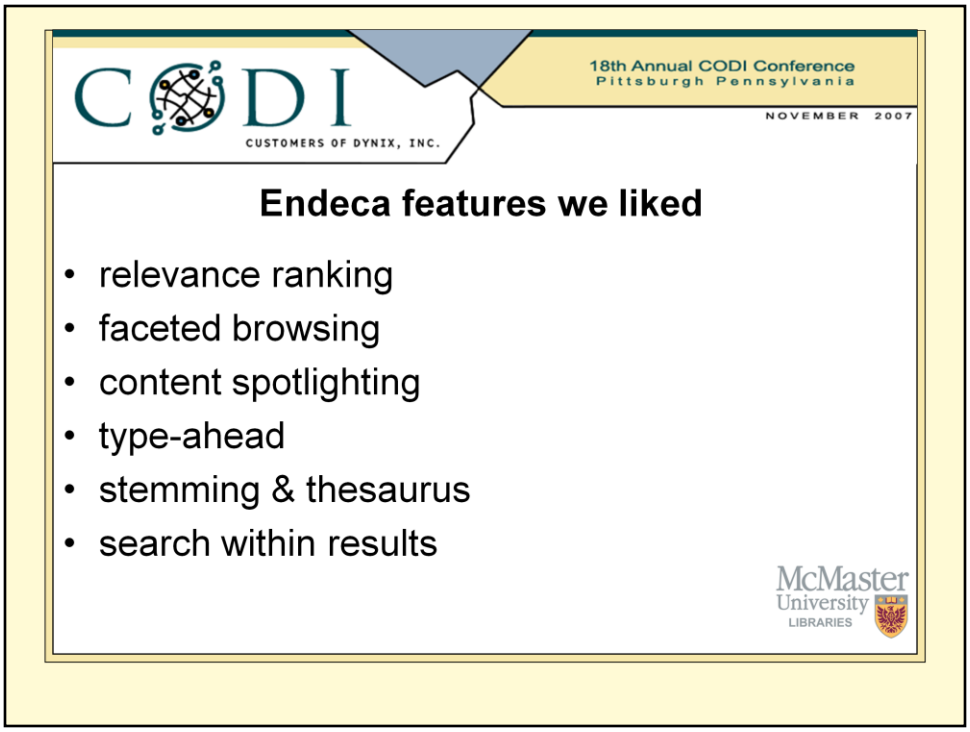


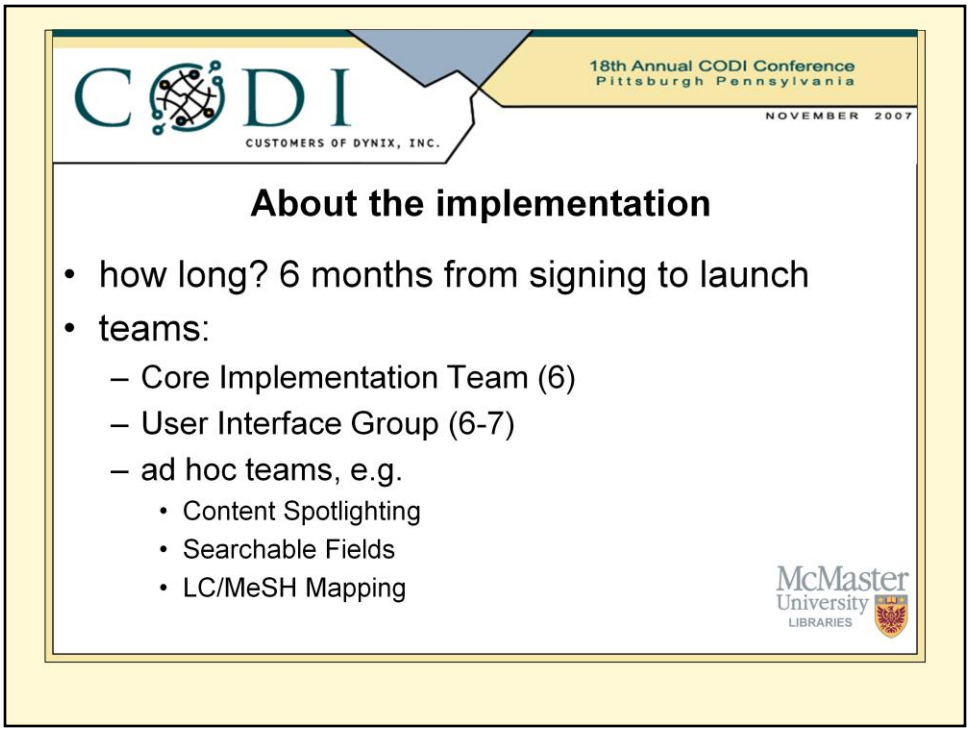
• our LibQual results said our previous e-resource discovery tools were hard to use; we wanted to address this fast!

• most students search with Google syntax, i.e. no syntax! …and expect relevance-ranked results

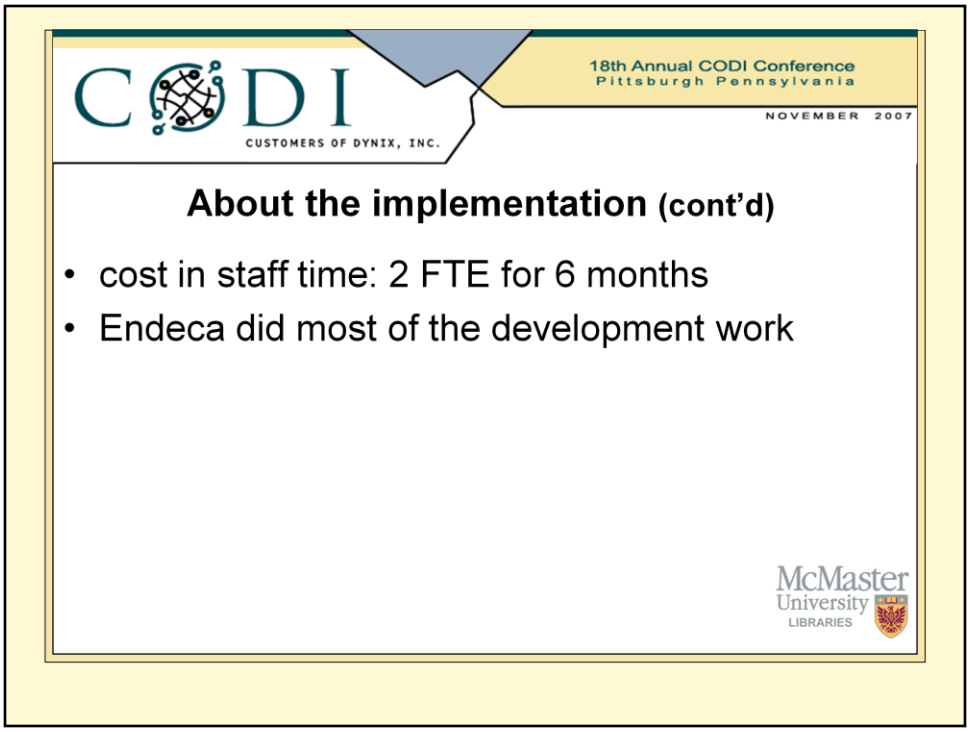
• Endeca could deliver a discovery layer quickly



• Endeca did a demo for us in August 2006; we were impressed!
• faceted browsing allows you to refine your search by clicking on a variety of options
• content spotlighting provides a context-sensitive tool to highlight recommended e-resources, e.g. databases, encyclopedias, basic texts, new materials, etc.
• type-ahead suggests authors and subjects that match the user's search terms
• stemming file traps both singular and plural of searched-for terms
• ancillary stemming file traps both British and American spellings of searched-for terms
• we can add whatever terms we want to the thesaurus, e.g. movies = motion pictures



•we signed at the beginning of October 2006
•launched our new interface in March 2007
•in addition to the core team and UI group, we had a number of ad hoc groups that we called together to make decisions as needed

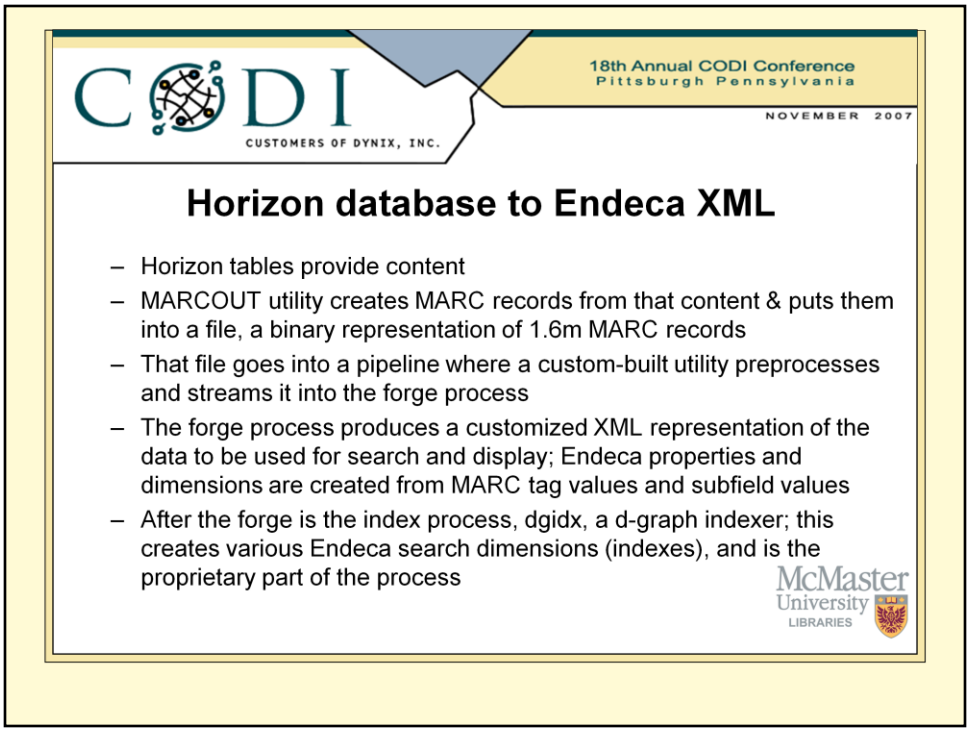


• cost in staff time is an estimate; we didn't keep strict track
• Endeca gave us 3 options: they could do all the development, we could work together to do the development, or we could do it all. Because we wanted to launch quickly, we went with option 1.

Timeline:

the 6 month whirlwind

- October 17-18, 2006 -- Requirements Workshop
- December 2006 -- Requirements; Beta
- January 2007 – Staff testing
- February 2007 -- Initial deployment
- March 2007 -- Usability testing; tweaking
- March 18, 2007 -- Release to the public
- Since then -- tweak, tweak, tweak



- just in case anyone's wondering!

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Before & after

- before: http://morris.mcmaster.ca
- after: http://libcat.mcmaster.ca

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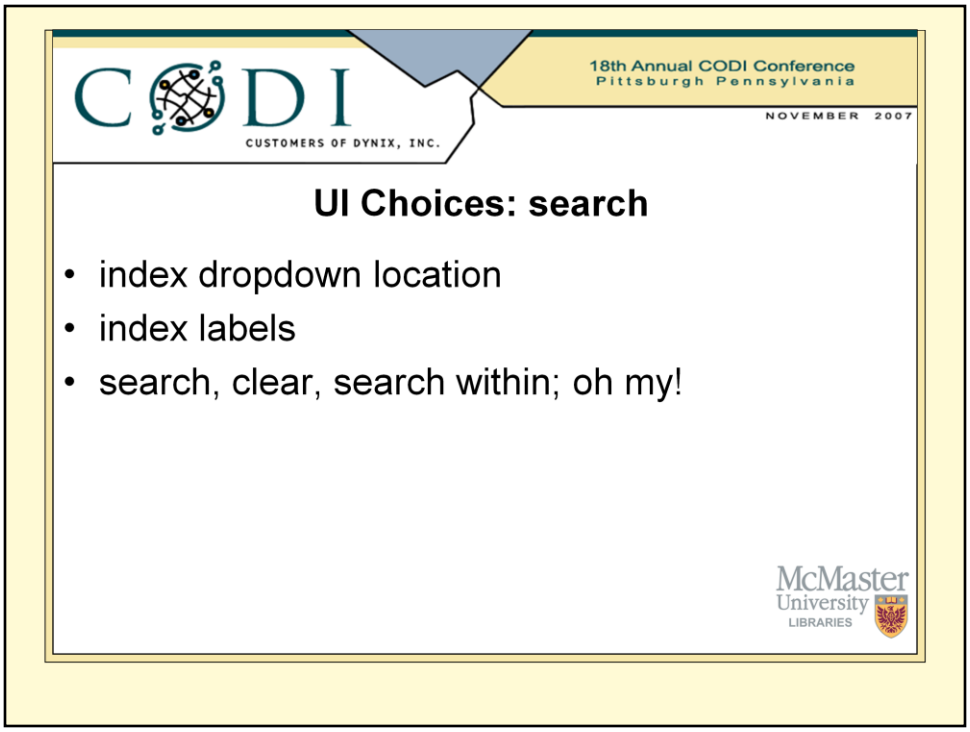


•Where to put the index dropdown (after the search input box rather than before) was a fairly easy decision, since we wanted to stay consistent with our previous HIP interface and our major database interface, Scholar's Portal

•We looked at other catalogues for index labels we liked; still not sure we've got it right though – our users were used to having the browse indexes first & some are disoriented with a default to keyword searching; maybe adding Keyword to the index labels would help, e.g. Title Keyword, Keyword Anywhere

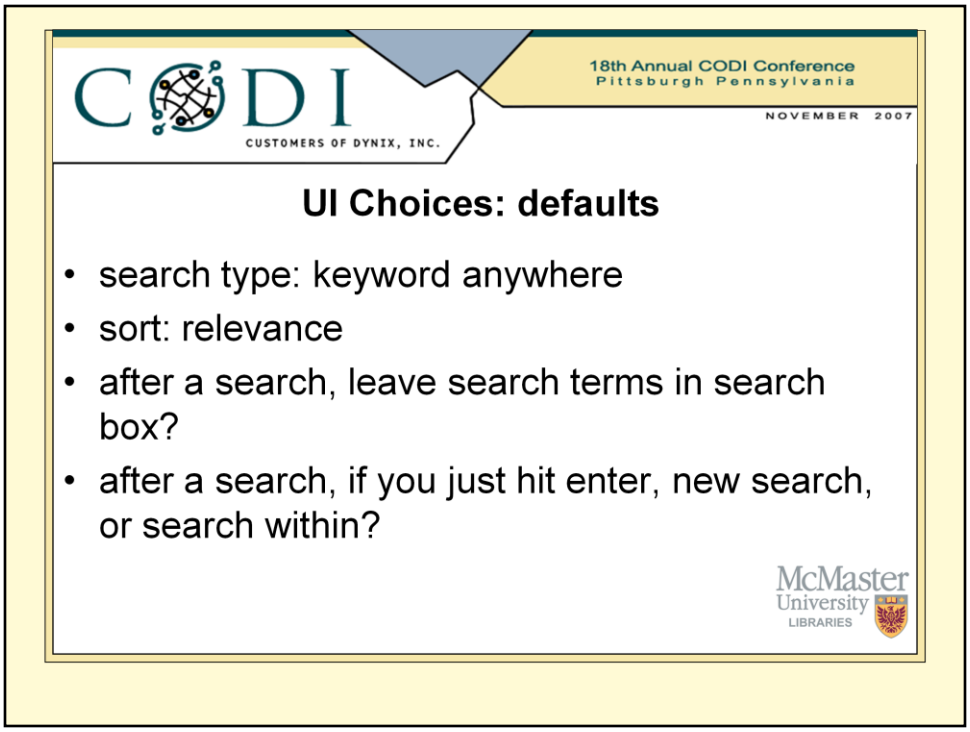
•When you haven't done a search yet, there's just a "Go" button to the right of the search box, but after you've done a search it gets a little complicated.

•We started with just a Go button, and a tick box underneath with the text "Search within results"; nobody saw search within, and people didn't know how to start over

•Added a Clear button to the right of "Go"

•Considered ways to make search within results more visible; went with a button, but then what to do with "Clear"?

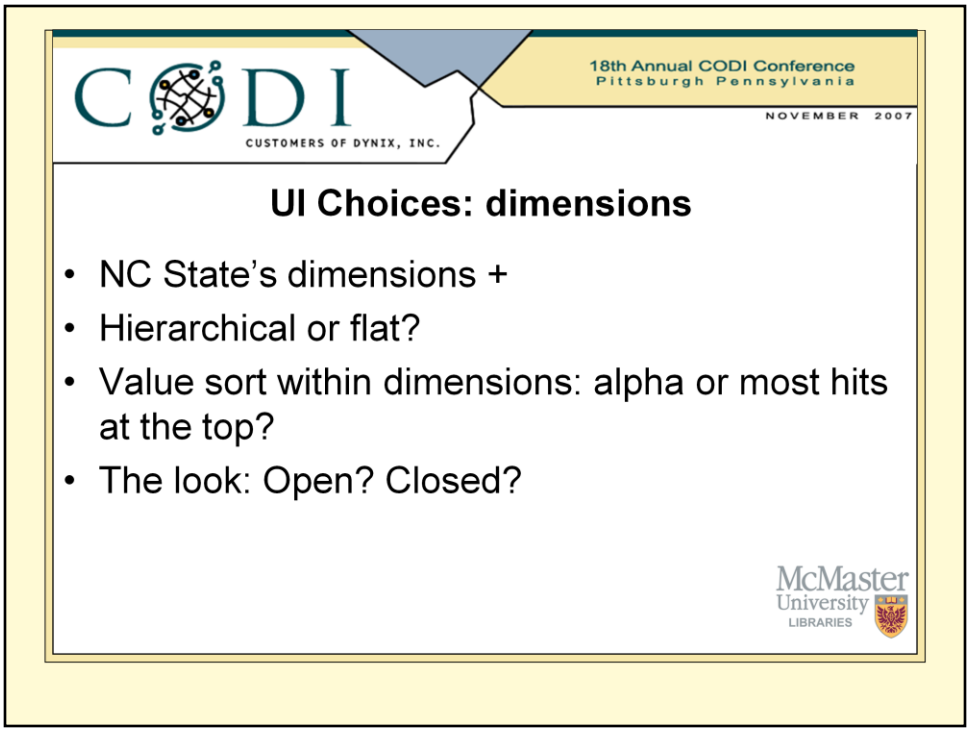
•Finally figured out we could combine the functions of "Go" and "Clear" into "New Search" , so still only 2 buttons! This seems to have worked pretty well.



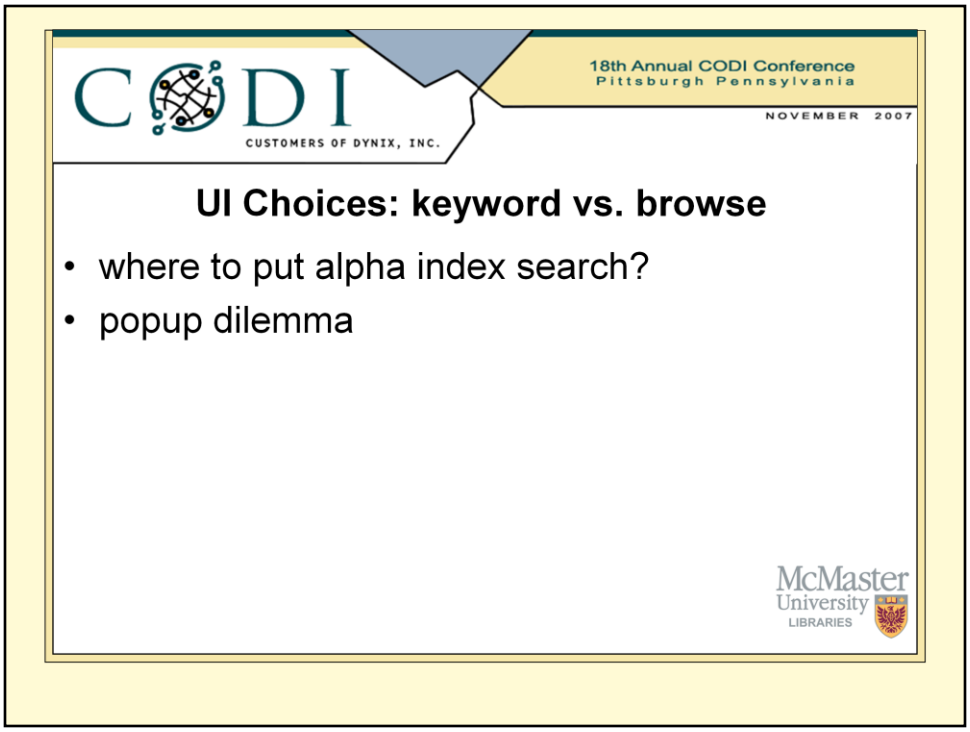
Our decisions so far:

• after a search, leave search terms in search box? No

• after a search, if you just hit enter, new search, or search within? New search



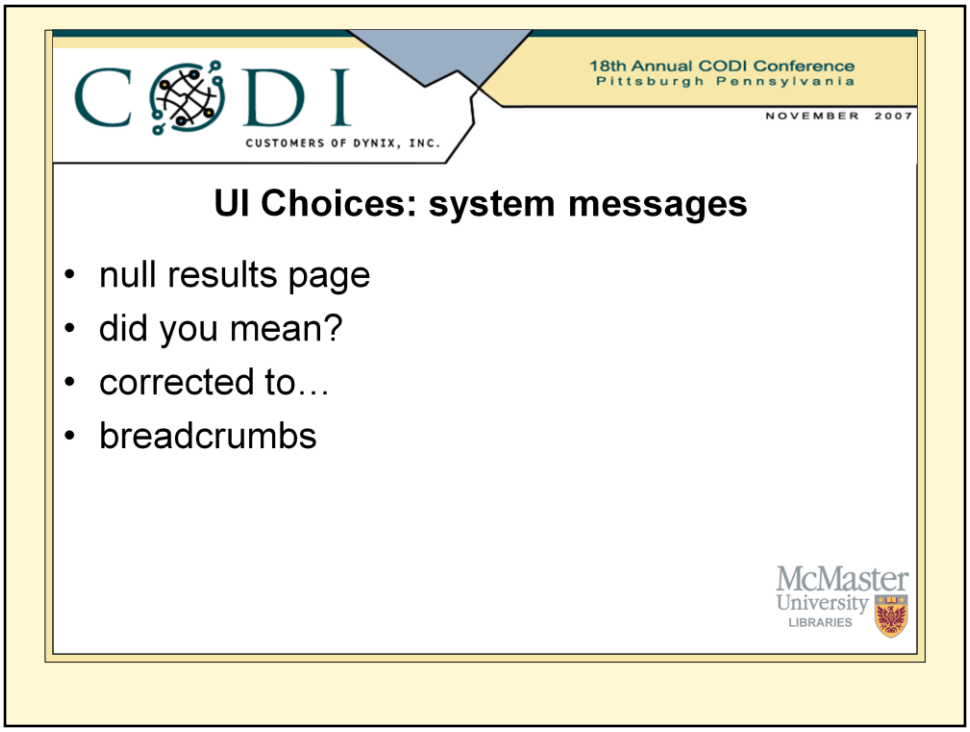
• Started with NC State's dimensions & they kindly shared their coding choices with us!
• decided on 10 dimensions, removed them from the initial basic search screen for a clean look, and exposed them in the search results page and on the advanced and browse tabs



• we initially separated the alpha browse search indexes from the keyword indexes by putting them in another tab – it didn't take long for us to change our minds, since no one could find them; we're learning most people just accept the default tab and the default index

• since Endeca doesn't do browsable indexes, we had to decide on how to deliver a HIP browse screen; decided on a featureless popup, because in testing, users maximized the HIP popup and never got back to the Endeca interface

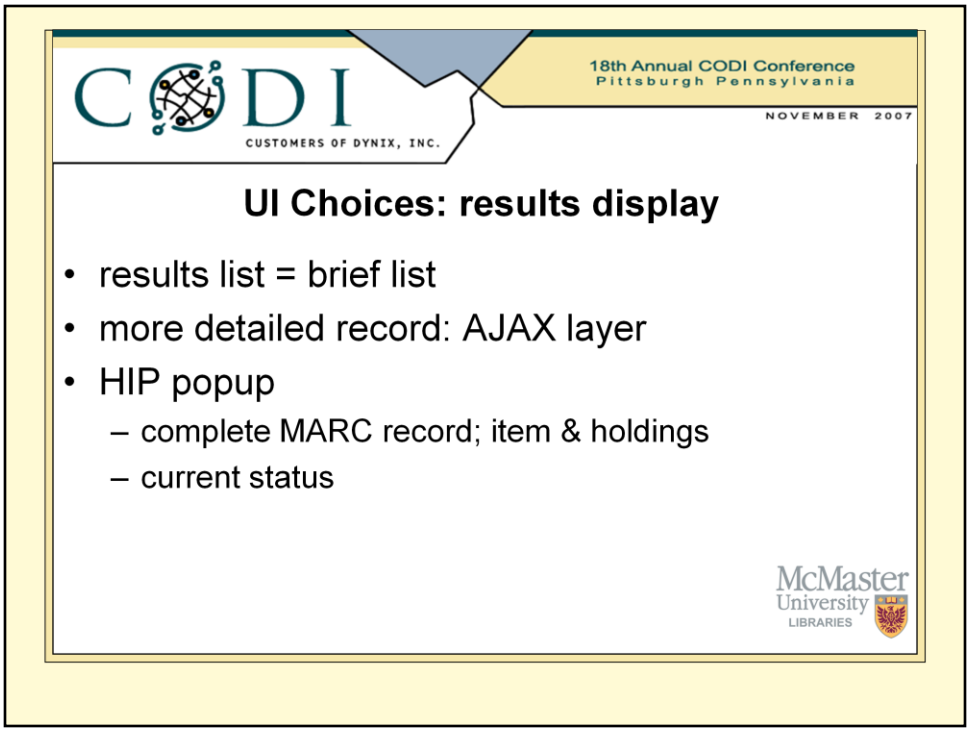
• the featureless popup has problems of its own, though, when a user opens a link to an e-resource and wants to use navigation, print, etc.



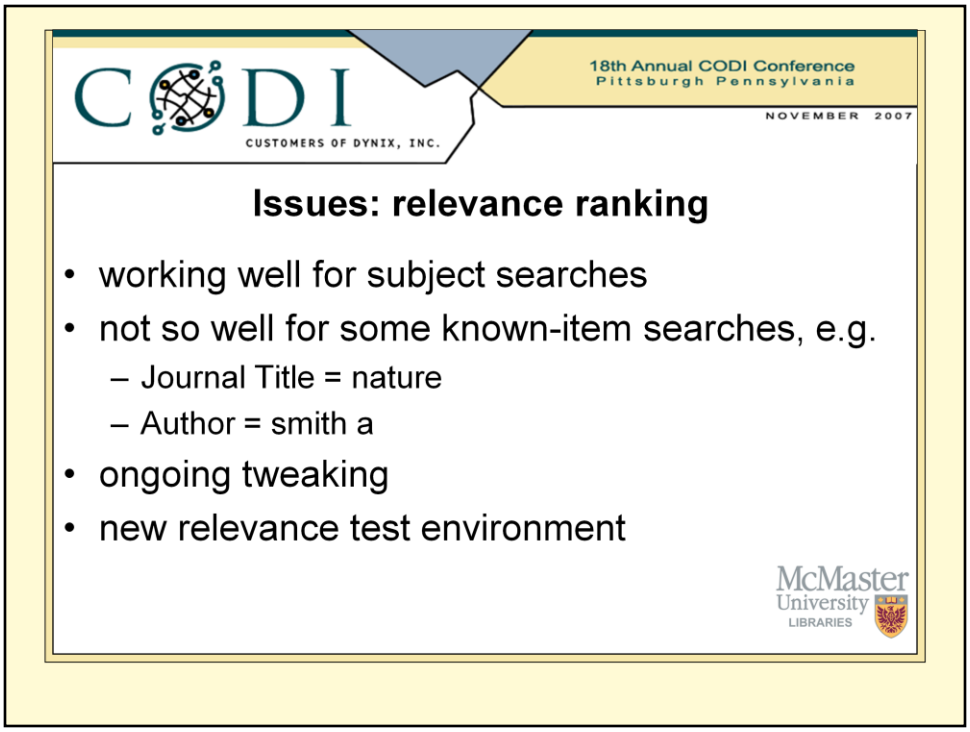
• null results screen provides suggestions for help

• did you mean and corrected to: we wanted to provide the user as much information as possible

• breadcrumb style: could have been horizontal or stacked; we thought stacked was easier to interpret



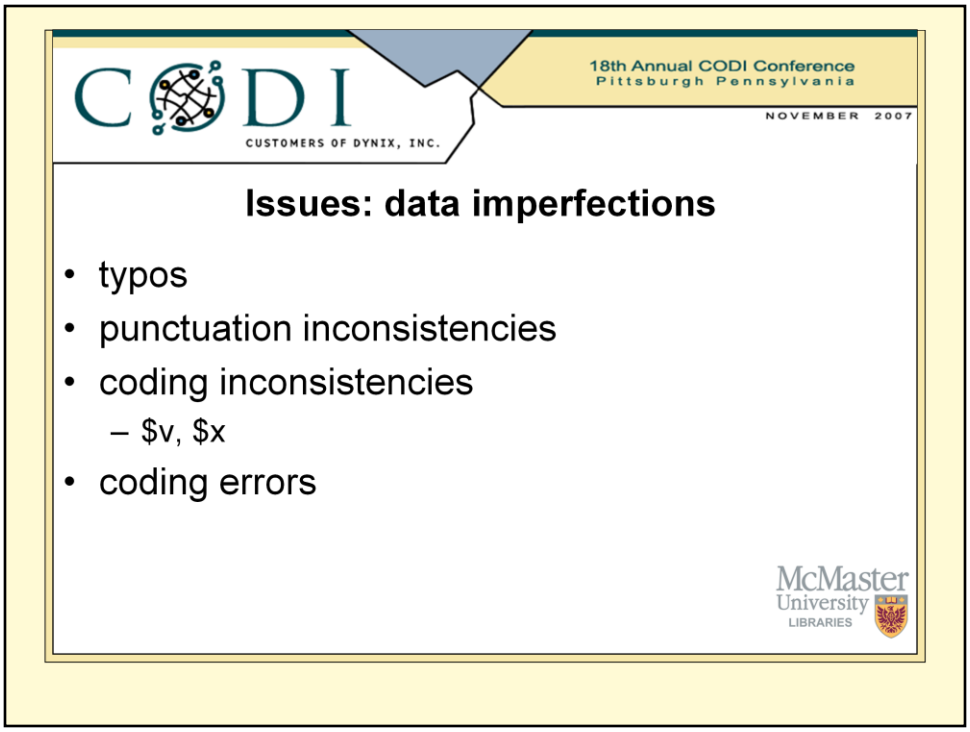
• most of the info in the HIP popup is coming soon to the AJAX layer, with the exception of massive holdings records, which will be abbreviated with a link to HIP



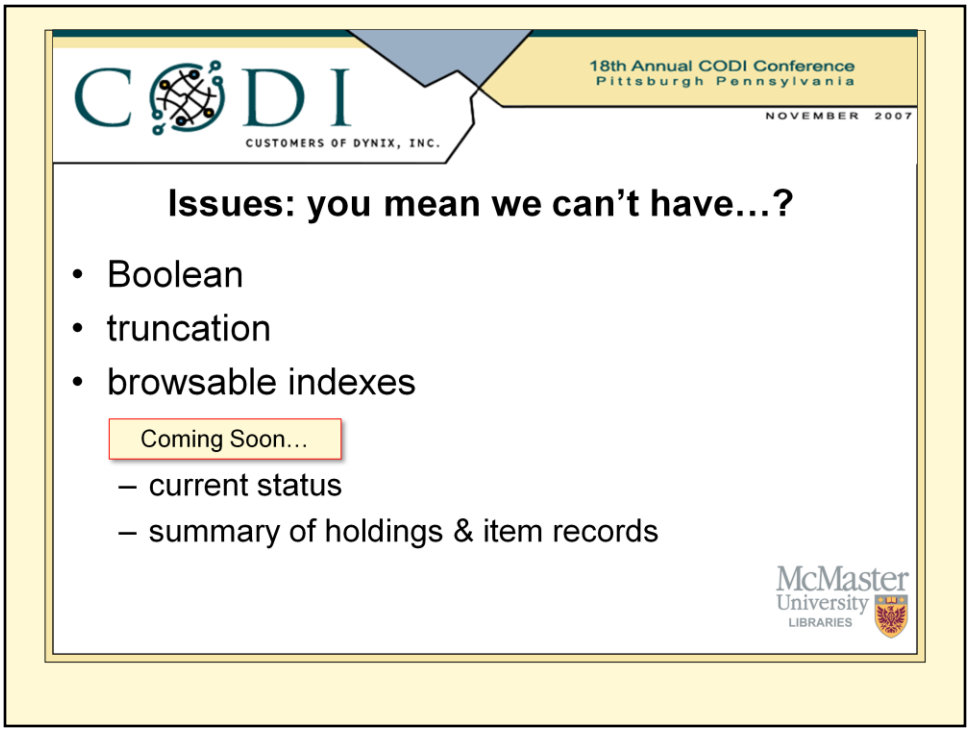
• we're trying to improve known-item searching by tweaking the relevance ranking, but there's only so much you can do! Sometimes a browse index is the only solution!

Issues: fuzzy logic

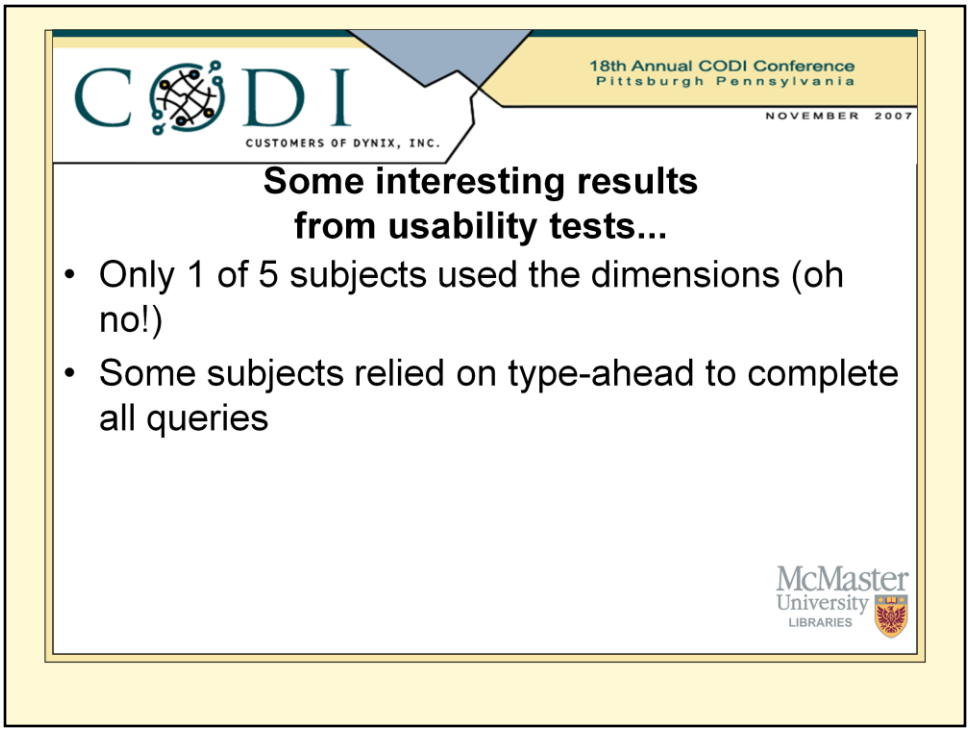
- matching on any 2 or more terms is a tough one for librarians to wrap their heads around
- add stemming on plurals and spell correction and results can occasionally seem baffling



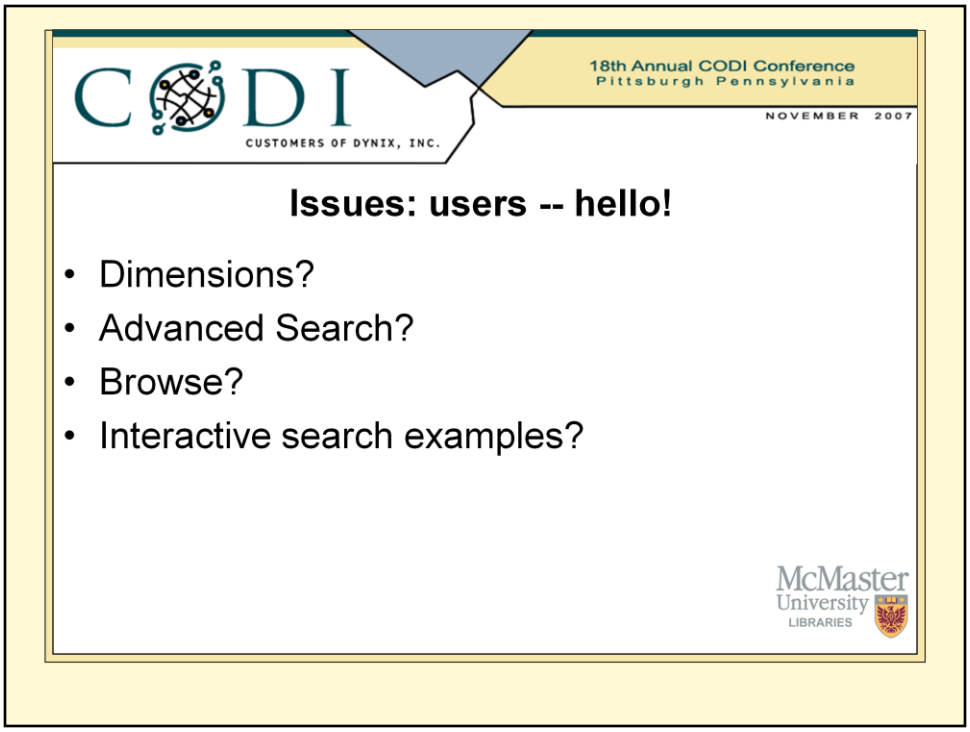
- …and incomplete catalogue records
- they show!



• our advanced search interface does the equivalent of an "and" and "or" search using the "all the words" and "any of the words"
• the stemming file can handle plurals, but not other alternate endings
• current status and summary of holdings/item records are coming soon



•Type-ahead: we've disabled the feature for now because it was truncating searches because of slow response time and it wasn't suggesting the matching authors and subjects with the most hits



- we're not sure if any of these great features are getting used much
- have to do usability testing & examine search logs

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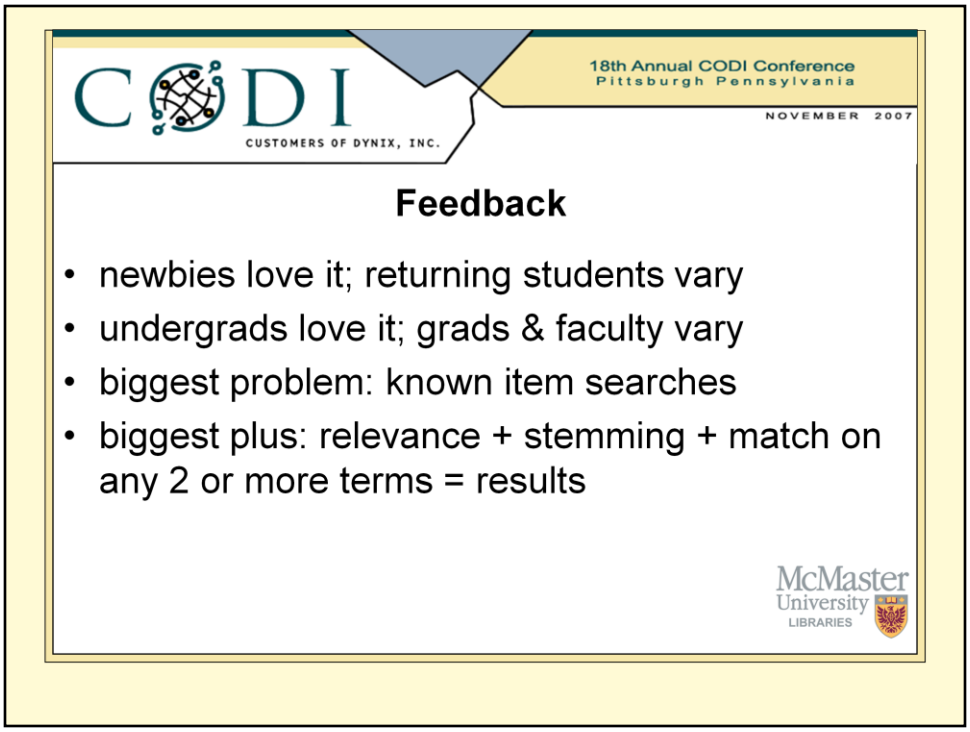
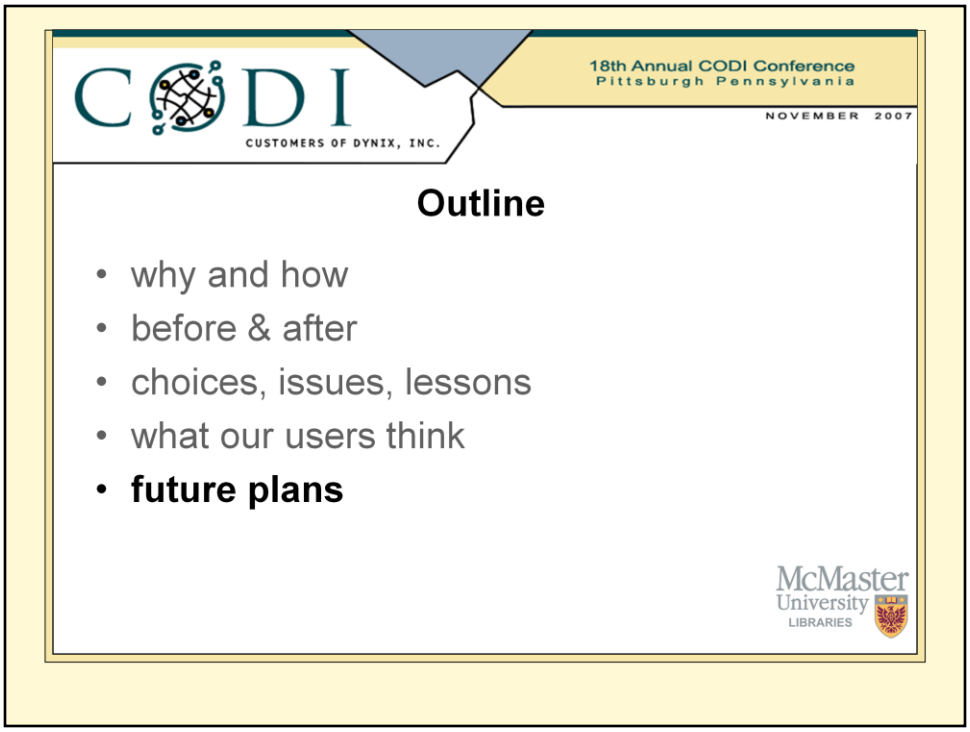


• undergrads tend to like it because it works well as a discovery tool;
• grad students & faculty, who tend to do more known-item searching, aren't always big fans, though some are

Feedback

- people who used to Google-search the catalogue & get 0 hits love it
- people who used to search the catalogue efficiently and effectively no longer know what they're doing, have to learn new skills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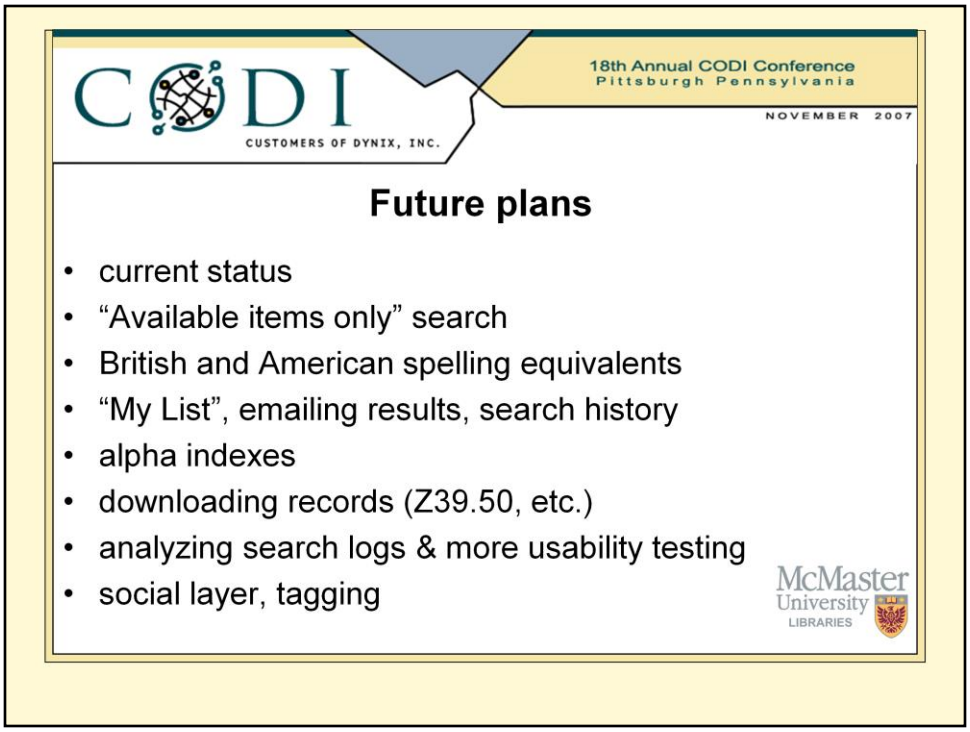

• current status is close; will be updated several times throughout the day
• search for available items only: once we've got live availability working, we'd like to add a search dimension that will allow our users to only search only for items that are in the library
• British and American spelling equivalents (ancillary stemming file)
• search history, the ability to add items to a "my list" feature and email those items to yourself or save/export them – our users are asking for these
• alpha indexes: find a better way to deliver them than the current featureless popup
• Z39.50: find a way to download citations into a citation manager using a z39.50 server

Check the video recording! Already forgotten ALL the questions (except the ones I couldn't
answer, grrr.)

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Thanks!

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http://userfriendlylibrarian.wordpress.com/

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