

Voyager Music Users Group (VMUG) Enhancement Requests Submitted to Endeavor (2005)

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VMUG submitted eight enhancement requests via Endeavor's formal enhancement request process in May 2004. A summary of results (and information about VMUG) can be found at <http://www.lib.uconn.edu/music/VMUG/>. Four requests are seeing action, either through new Voyager features or inclusion in the Voyager Enhancement Council's 2004 enhancement recommendations (these may or may not become Voyager enhancements). At the February 2005 VMUG meeting, members agreed to resubmit the remaining four requests (see below). These have been rewritten and condensed for conciseness and proper rendering in Endeavor's SupportWeb database. Any new concerns from VMUG members should be further tested, discussed (via email or meetings, preferably at MLA 2006), and formally written up over the coming year. Also note that Endeavor will be changing its feedback structure in the near future.

All enhancement requests are for the OPAC.
Items are in rough priority order.

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1. Make the Simple Limits drop-down menu available on the Builder search page.

1. Problem Description

The Simple Limits drop-down menu does not appear on the Builder screen. Users like the ease and convenience of the Simple Limits menu and wonder why it is not in Builder. Many users (both staff and patrons) are in a hurry and want an easy way to apply a limit. Going into a separate web page (Limits) makes a simple task more time consuming and frustrating, especially if the user must frequently change the limit. This makes the Builder search less desirable/useful, even if Builder has otherwise useful features.

2. Example Description

A user seeks Irish folk song recordings. She constructs a Boolean search in Builder by putting IRISH IRELAND [ANY terms] in one box and FOLK SONGS [ALL terms] in another box. The search retrieves books, musical scores, recordings, and videos. There is no fast way for her to specify recordings when constructing her search, unless she goes into the slower Limits page (pre-or post-search). If she wants to apply Simple Limits, she will have to learn how to use the Keyword or Command searches in the Simple Search page, even though Builder is often the more intuitive search for users to learn.

3. Productivity Impact

Adding the Simple Limits menu to Builder would bring consistency to the Simple Search and Builder, and make the latter a more efficient search. In addition, Builder would look more like other database interfaces that offer pre-search limits right on the screen (users expect this now). All of these factors would make it easier (1) for users to search in Builder (because of increased intuitiveness and convenience); (2) for librarians to promote and teach Builder to beginners and experts (same reasons). This enhancement request ties into Endeavor's User Centered Design initiative by making the interface more consistent and intuitive for users. In addition, it ties into the Functional Requirements for Bibliographic Records (FRBR) by allowing users to more easily find all manifestations embodying the various expressions of a given work. (NOTE: an enhancement request specifying more detailed Limit tabs/menus in every title results screen would take precedence over this request.)

2. Add detailed Limits tabs/menus to results screens for faster post-limits.

1. Problem Description

Users do not have a convenient, obvious way to assess search results and apply a post-limit (especially by format). The Post Limits button and the Simple Limits menu provide no information about results (e.g., 12 books, 18 sound, 43 scores, 3 video), plus, going into a separate Limits page is cumbersome, particularly if the user is browsing several headings (this requires applying a post limit each time!). Users have access to Post-Limit tabs in other database interfaces (e.g., Cambridge Scientific Abstracts), and expect to find them in the library catalog. OCLC's FirstSearch WorldCat is a good example. WorldCat's search result ("Titles") screen has buttons and menus across the top that provide information about the results set, and allow the user to instantly refine the results set, with no instruction or orientation required from librarians. For example, formats appear as buttons: ALL (89) -- SOUND (15) -- VISUAL (3) -- BOOKS (21) -- SCORES (50); this information comes from the record type in the leader's 06 character position. Menus drawing from the 006 and/or 007 appear below the buttons: AUDIENCE (e.g., juvenile) -- CONTENT (e.g., biography, fiction) -- FORMAT (e.g., CD, LP, DVD, VHS). COMPOSITION (e.g., suites, operas) also appears when results are limited to scores or recordings display. This Limit tab/menu approach is both convenient and easy to use.

2. Example Description

The user searches for a *Midsummer Night's Dream*. (This could a Builder, Command, or Keyword search. In the case of headings browse searches, the user selects a heading from the headings list.) Ideally, the user would see Limits tabs in all title results lists. Example: All (179) -- BOOKS (117) -- SCORES (18) -- SOUND (35) -- VISUAL (9). There might also be drop-down menus with format, content, type of composition, etc. With a single click (and probably no instruction), the user clicks on the VISUAL tab to limit her results to just the nine videorecordings. The VISUAL tab is highlighted, so she knows which group she is in. She browses the list, then realizes she could really use a spoken recording of the play. Because the tabs appear on every title list (regardless of the actual limit applied), she need only click on the SOUND tab to see the list of recordings. If she wants to be very precise, she could use the Format menu and select "non-musical recording" (to find three spoken recordings) and/or "compact disc" (with nine recordings). She might select "opera" from the "type of composition" menu and finally click the SCORES button to find musical versions of *Midsummer's Night Dream*. The user finally decides to browse the books and scripts, and easily finds them with one click of the BOOKS tab. This sort of intuitive, convenient navigation is just what Endeavor's User Centered Design initiative hopes to achieve.

3. Productivity Impact

Libraries must currently put everything into one Simple Limits menu if they want to offer "same page" limiting on title results screens. Such menus are long and cumbersome, or they omit useful limits for the sake of brevity. Users cannot combine frequently-used limits in an efficient manner without going into a separate page. The tab/menu approach would remove these barriers and give users more control over their own searches. This has been one of WorldCat's BEST improvements, where limiting is now intuitive, easy, and fast. In terms of productivity, the tab/menu approach allows users to (1) more quickly assess search results and decide how to proceed; (2) quickly and effortlessly display only the desired material (in quick succession if needed), often with no instruction; (3) focus on the search results, rather than interface mechanics; and (4) avoid unnecessary clicks, page loads, and scrolls associated with the Limits page (especially when doing headings searches). The tab/menu approach would add functionality to the headings searches, especially if users could select the limit before selecting a heading (Voyager would quietly apply the post-limit when the titles are displayed). More efficient limits could potentially reduce network and server loads. Teaching the interface in the classroom and at the reference desk would be easier and faster if limiting were more obvious and intuitive. This enhancement request is potentially a strong candidate for Endeavor's User Centered Design initiative. In addition, it ties into the Functional Requirements for Bibliographic Records (FRBR) by allowing users to more easily find all manifestations embodying the various expressions of a given work.

3. Create an intuitive (alphabetical) jump-bar for the Name/Title Headings search.

1. Problem Description

SUMMARY: Users do not have a way to quickly find the titles in a Name/Title Headings browse search. They must either browse dozens of screens, learn an unintuitive shortcut, or (depending on the institution), use an imprecise jump bar. **DETAILS:** When Endeavor offered a Windows OPAC interface, users thought the Name/Title Headings search was easy to use. It was especially effective for music searching: all headings appeared in one list and a vertical scroll bar allowed quick navigation among an author's complete titles from A to Z. The Name/Title Heading search is now available in WebVoyage (Simple Search menu), but users have trouble navigating the results. To move alphabetically from Mozart's Andantes to Mozart's Magic Flute (or Zauberflote), one must click the "Next" button dozens of times. Librarians can teach a shortcut that jumps the user to the desired title: type or paste the entire name/date/title (example: Mozart, Wolfgang Amadeus, 1756-1791. Magic Flute; in this case, Magic Flute is actually a cross reference to the correct title, Zauberflote). Users never discover this shortcut on their own, and most find it cumbersome and difficult to remember. They need an alphabetical jump bar. Unfortunately, the jump bar that is available in other searches is imprecise and often does not lead users to their desired titles. **OPTIONS:** This problem could be alleviated by adding (1) an alphabetical jump bar that takes users to titles (in the Name/Title Headings list) starting with a certain letter; (2) a box in the headings display where users can type the first letter(s) of the desired title (e.g., sym); or (3) a headings list that displays in a simple text-only format in a single scrollable screen, similar to that offered in the original Windows interface. (Note: the new Keyword Headings Search will alleviate some problems, but will not replace the Name/Title Headings browse search, so an effective jump bar will still be important.)

2. Example Description

EXAMPLE 1. The user seeks symphonies by Ludwig van Beethoven. She knows that the Name/Title Heading search provides effective results for music. In WebVoyage she types BEETHOVEN and selects the Name/Title Heading search. Her search brings up 1,650 headings. Now she needs to navigate to "S" to find the "symphonies." It is 28 clicks away using the "Next" button. This is slow and cumbersome, and she has ten other works to search before class starts! She, like many other users, never seems to remember the shortcut of copying and pasting a name/title heading (replacing the title with one she wants). Even if she could use Voyager's jump bar, it would not help, because it would look something like this: 1 51 101 151 201 251 ... 1,650. It is too hard to guess where the S's will fall in that jump bar, and very likely the S's are in the 1000s, so she would have quite a bit of clicking anyway. It would be helpful if she had an alphabetical jump bar so she could just click on S. It would be even better if she could type the first few letters (sym) in a little box and go straight to the symphonies. (Really, she'd best like to use a scroll bar to go up and down from A to Z and see all the headings in one screen. That makes it easy to quickly spot other appropriate headings she hadn't thought of, such as Orchestral Music or Works. She misses the old Windows OPAC, which allowed her to do that. It was fast and easy.) **EXAMPLE 2.** A literature student seeks several versions and editions of Shakespeare's *Tempest*. She knows that the Name/Title Heading search will group all these versions, languages, and excerpts under one standardized title (she also likes the cross references that this search provides). She types SHAKESPEARE, selects the Name/Title Headings search, then wishes there was a way should could get directly to "tempest" without having click the "Next" button so many times, or without having to guess what number the heading might be in the jump bar.

3. Productivity Impact

Many users do not take full advantage of the Name/Title Headings search because it is too hard to quickly find the desired item in the headings list. This is unfortunate, because for some types of materials (including music), this search is extraordinarily effective. Users LOVED this search when they used the old Voyager Windows OPAC interface (where the results were easy to browse). Those who learn the copy-and-paste shortcut in WebVoyage also come to rely heavily on this search, but find the extra steps cumbersome. Still, it is unrealistic to teach a non-obvious shortcut to everyone just to make a search usable. Having an jump bar with letters (rather than a jump bar that requires guessing and many clicks) would (1) open this search up to our users who are too frustrated to use it, (2) make searching faster and more efficient for those users who rely heavily on this search, (3) allow librarians to teach refined search strategies, rather than focus on overcoming the interface, and (4) help bring this search in line with Endeavor's User Centered Design initiative.

4. **Redirected Name/Title Heading searches should include some title subfields.**

1. **Problem Description**

In WebVoyage, when users click on a name/title heading in a displayed bibliographic record, the redirected search looks for only the name (100 or 700a), even if the library has set “Name/Title” as the desired redirected search. This is misleading and inconvenient for users. Users who click on a particular name/title (e.g., Shakespeare...King Lear) expect to find similar items (i.e., other editions of Shakespeare’s King Lear, the 100/240 or 700a/700t). Instead, they find themselves at the beginning of ALL Shakespeare titles and must browse through a lengthy list to find King Lear again. This is confusing, misleading, and not very efficient. (The redirected name/title heading search should be similar to redirected subject heading searches. For example, when users click on “Japan—Social Conditions,” Voyager searches all the subfields, including “Social Conditions,” rather than placing users at the beginning of the “Japan” subject heading list.)

2. **Example Description**

See King Lear example above. Here is another example using a compact disc of Gilbert and Sullivan’s “Favorite Overtures.” A user finds this disc in the catalog. She would like to see more of Sullivan’s operas. In the record she clicks on “operas selections” (240 field, uniform title) and finds herself in a title list of “opera selections” for ALL composers (rather than Sullivan’s operas). The list is too broad and cannot be navigated. The user goes back to the record and clicks instead on a single opera (e.g., the Sorcerer), hoping for more specific results. She finds herself in a long list of authors and/or a list of 200 items by Sullivan, starting with “A.” Either way, finding The Sorcerer will require more browsing. It would be more logical and quicker for her if the redirected search took her directly to the requested title (with the correct author). The results would also make more sense to her if the headings in the results screen looked like the one she just clicked on (name, then title).

3. **Productivity Impact**

Hotlinked entries in records are tempting, and they imply that one will find “more items like this.” They are meant to save time and make it easier to navigate the catalog. Inappropriate redirects have the opposite effect: they take more time to navigate (especially if results are excessively broad) and can result in greater user frustration. Savvier users learn to avoid these redirects and just do new searches (sometimes by copying and pasting headings). Changing the Name/Title redirects to find both name and matching title would save time for both novices and experts by giving them more precise, predictable results for less effort, and would fit nicely into Endeavor’s Usability Initiative. This enhancement would also help librarians reinforce the usefulness of “following these links” (and would eliminate the problem of teaching workaround or “feature avoidance”). On a more technical note, institutions should be able to indicate whether the redirected Name/Title Heading search will search just through the |t, or include all title subfields in that field. For example, a redirected Name/Title Heading search on 700 12 |a Mahler, Gustav, |d 1860-1911. |t Lieder nach Rückert. |p Um Mitternacht. |o arr. could focus search |a through |t and retrieve all headings containing the set’s title (Lieder nach Rückert), or could more precisely search all subfields and retrieve only headings that exactly match all the subfields (in this case finding ONLY the arrangement of one of the songs). Both approaches are valid and should be a local decision. Also, perhaps the new Keyword Headings searches could be offered as redirects. Again, the institution should be able to indicate choose a couple of subfield options (e.g., “search through |t” or “include all title subfields”).