2017–2018 CARLI SFX Systems Committee Annual Report

Membership
Steve Brantley, Eastern Illinois University
Karen Gallacci, Southern Illinois University Edwardsville
Andrea Imre, Southern Illinois University Carbondale
Max King, Illinois Institute of Technology
Geoff Pettys, Southern Illinois University School of Medicine
Laurie Sauer, Knox College
Peter Tubbs, Rush University (no attendance)
Erika Wade Smith, Illinois College
Lisa Wallis, Northeastern Illinois University
CARLI: Denise Green, Mary Burkee (partial year)

Meetings
We met for an in person meeting on October 20, 2017 at the SIU School of Medicine; Geoff Pettys hosting. Telephone conferences were held on the second Wednesday of the month, from 10am – 11:30am. The committee also assisted with SFX Interest Group Open Conference Calls.

- Thursday July 27, 2017 10:00 am – 11:30 am
    o Changes in direct linking were discussed
    o Discussed ideas for the annual project

- Wednesday August 16, 2017
    • Karen and Max will co-chair
    • Committee decided to work from a Google Doc created from the outstanding VuFind3 issues in GitHub. Members agreed to comment on issues already listed and other e-resource related issues.
    • Members will encourage student workers to test VuFind3

- Wednesday September 13, 2017
    o Discussed the document that we would turn in for the annual meeting, with a follow-up by email
    o Decided to test VuFind 3 in coordination with SFX. Committee members are especially interested in customizations available.
    o Elements of Citation Searcher were discussed

- Friday October 20, 2017 (in person with remote attenders)
    • Max talked about IIT's planned transition to VuFind3
    • Committee members listed positive aspects of VuFind3
    • A list was made of 12 items that were areas for improvement or points of concern about VuFind 3
    • A list of 11 action items was created consisting of question for Denise to ask the developer, a new google doc for likes and dislikes of SFX and VuFind 3, and a decision to continue to add to the action items list throughout the year

- Wednesday November 8, 2017
    • Denise asked for feedback on her Citation Linker/Fetch item web lesson
    • Progress report and additional discussion on the action items from the previous meeting

- Wednesday January 10, 2018
    - Discussed the usage report of the SFX tutorials on the CARLI website. Lisa volunteered to assist Denise with a new lesson about customizing CSS in SFX A-Z lists
    - Progress report and additional discussion on VuFind action items from the previous meeting
    - Steve reported on the CARLI annual meeting and agreed to send out documents from the meeting to the committee

- Wednesday February 14, 2018
    - Progress report and additional discussion on the action items from the previous meeting
    - Max reported on ITT's transition to VuFind 4

- Wednesday March 14, 2018
    - Denise asked for feedback on her new tutorial about switching to the simplified template
    - Max reported on ITT's lingering issues with VuFind 4
    - 5 of the committee's action items have been completed
    - Discussion on remaining action items

- Wednesday April 25, 2018
    - Committee's VuFind 4 suggestions that were implemented were well received by users: hide eresource; journal title search; SFX button
    - Andrea raised 2 additional VuFind 4 concerns:
        - Not easy to toggle back and forth between I-Share and local catalog
        - Facet display does not always show local library, ranking needs changed

- SFX open conference call in September focused on Citation Linker
- SFX open conference call in October focused on the new A-Z list
- SFX open conference call in January focused on the new A-Z e-book list & Citation Linker/Fetch Item
- SFX open conference call in June focused on Improving the SFX interface quickly and efficiently

Deliverable
The SFX 2018 annual project tested and recommended SFX features and displays in the new VuFind 4 Online Public Access Catalog (OPAC).

The SFX Systems Committee worked with CARLI staff to test SFX linking, UI display, and other features in the VuFind 4 OPAC. We used Google Docs, CARLI's GitHub, and lists of action items to track features ready for testing or further comment. Feedback was also given on searching for e-resources and journals in VuFind 4 since that is closely related to SFX usage in an OPAC. Finally, the committee recommended several display changes to declutter screens and improve serial holding displays.

We also worked with Illinois Institute of Technology to further explore SFX features during their early adoption of VuFind 4.