VuFind is an open source next-generation discovery tool developed at Villanova University. It describes itself as a “library resource portal designed and developed for libraries by libraries.” At the University at Buffalo, we implemented the basic module of VuFind in 2010 as a layer on top of our library catalog, Aleph, searching the same data but with slightly different indexing. We still consider our version to be Beta.

Many add-ons and customizations are possible. As with all open source products, the amount and extent of changes are in part dependent on staff and time available. I will be showing some of the changes we made at UB and pointing out different approaches various libraries have taken to customizing features where there is no clear best practice. Although I have been busy requesting changes, I did not and could not actually make any of the changes—these are made by our Systems department.

[image: http://vufind.org/]

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To gather a list of changes, I recommend checking for functionality on implementation and periodically thereafter. It is essential to create and maintain dated lists of issues to check and revisit: what issue; indexing requests; specific fields and subfields affected; and sample records, searches, and screenshots. The Music Discovery Requirements document discusses critical issues to examine in any discovery tool, but I will say briefly that critical issues I check are facets and brief displays in results lists; functionality of linked controlled access points; and display of notes fields, uniform titles, and added entries in individual records. I usually test out a keyword search for Mozart to look at search results and facets, and then search for and examine records and link functionality for compilation classical CDs, opera videos, and my trusty standby, John Adams. In our instance of VuFind, I have not spent time examining the Advanced Search feature, because our classic catalog is available for users who want that functionality.

[screenshot: http://catalog.lib.buffalo.edu/vufind/Search/Results?type=AllFields&lookfor=mozart+magic+flute&submit=GO]
The process of customizing the interface is ongoing. As long as no indexing changes are made, changes to displays, especially within individual records, are relatively simple.

We made many changes to individual records, most of which just involved turning on field displays and assigning appropriate labels. The record display on the screen does not represent these changes, however, because we recently implemented Summon and lost many of them, which is one of the reasons I strongly recommend keeping a list.
One of the first and easiest decisions we made was to remove the out-of-the box author biographies feature. This default feature is prompted when a user clicks the linked personal name main entry in a record. The result is a display containing the beginning of the Wikipedia article and accompanying image for that author, along with “related” subjects and a list of titles. We kept the lists of titles and subjects, but removed the Wikipedia content. After unresolved philosophical debates about pointing students to Wikipedia, the matter was settled with two searches: The “John Adams” link from the record for *Nixon in China* generated the correct search for Adams, John, 1947-, but added the wrong Wikipedia content. Jane Austen matched on the right heading and biography, but inexplicably and repeatedly incorporated the wrong image.

It seems the Jane Austen picture was just a glitch, but as is unfortunately the case in various discovery systems, the “John Adams problem” persisted.

Decisions about post-search facets were less clear cut.
As with all next generation discovery tools, VuFind relies heavily on facets. Facets are quite customizable. Nearly all of the facets require examination in terms of definitions and labels, and I will show three that we spent time discussing. One is derived from call numbers, and another from various fields indicating dates. The third is format, where we made customizations and additions to meet needs for searching music and media.
One problematic facet is created from call number fields. Some instances use the labels Subject Area or Academic Discipline. Other libraries, including UB, have labeled this facet “call number,” and listed the corresponding broad subject area. Either way, this is problematic for music—the number of items listed in this facet will likely be far less than the actual number of items held, particularly for sound recordings, which are not necessarily given call numbers. Sound recordings may contain call numbers erroneously coded as Library of Congress, leading to music recordings’ being misrepresented as diplomacy, medicine, or agriculture.
At UB, the number of scores is hugely underrepresented in the call number facet. We don’t use LC for most scores in our collection, so there is no field 050 or 090 with which to populate the facet, which is driven by the call numbers in bibliographic records, not holdings records.
The facet derived from date is another case where there is no one best solution. Any label indicating time period will be ambiguous as to whether it is referring to subject matter, production date, or publication date. Some libraries have gone with “Era.” Values in “era” in the instances at Brandeis, Washington DC Public, and Brown, shown on the left, are derived from chronological subdivisions or other date fields in subject headings. In the instance at I-Share, dates appear to be derived from both subject headings and the date coded as “Date 1” in MARC field 008 [008/07-10], which is also an ambiguous date that may variously represent current publication, original publication, date of production or recording, or a best guess.
Other libraries use a “Publication date” facet based on the publication date fields in a record. These facets may display a list of years and ranges; allow users to specify a date range; or both. At UB we removed the facet completely in favor of a box for users to enter a date range. This works around the problem of being unable to change sort order from predominance to reverse chronological order, and it eliminates any ambiguity of the term “era.”
The out-of-the-box format facet did not include an adequate number of choices to search for music and media. At UB, we looked at instances at a number of libraries, and a group of staff working with media, music, and law collections developed a fuller list of content and carrier terms with accompanying MARC maps. We wanted to expand the formats listed to include at least CDs, DVDs, LPs, and VHS. We have had mixed results: CDs and LPs are still not options, and we found that VuFind is stripping out the added MARC 007 fields that code additional formats—this means the facets don’t reflect all media in the collection. Needless to say, these issues are on my list.
So here is my current list of issues I would like to visit or revisit, and a list of a few of the other customizations that we made. Both lists continue to change as we make adjustments to VuFind.

A lot of technical information is available on the official VuFind website, and there is additional information online through various libraries that have implemented VuFind. For system-neutral display, indexing, and functionality recommendations, as well as MARC mappings for format facets, keep an eye out for the Emerging Technology and Services Committee’s Music Discovery Requirements group’s report.

### Additional changes we made
- Google preview
- Link to ILLiad
- Maps of library linked from call number
- Reordered facets
- Feedback button
- Removed 041$h (original language) as code generating language facet
- Improved availability display

### The List
- Secondary formats added to Format facet
- Add corporate authors to author facet
- Add additional contributors to author facet
- Add names and uniform titles to subject facet
- Add uniform title facet?
- Define “Region” facet
- Add CD, LP as format types
- Previous/Next button

[http://vufind.org/]
Customizing VuFind at the UB Libraries

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