

In today's Internet world, a library's OPAC can either make or break a patron's initial experience with the library. If patrons cannot use the OPAC quickly and efficiently they will go away frustrated with the OPAC, but also with the library. This is particularly true if these are new patrons. Perhaps they weren't frequent library users before, but now they can search from the comfort of their own home, so why not give it a try. Libraries must be aware that the Internet has opened their virtual doors.

I examined a number of OPACs – it is kind of an addictive exercise once you get going. There are differences and similarities. Some of the sites I looked at were obviously running the same library catalog software, some mentioned they would soon be upgrading, and others announced that they had just unveiled a new catalog. Clearly, an OPAC is something that must grow and change as technology and user knowledge and expectations change. Some libraries have been better than others with keeping up with the current trends of OPACs.

I selected the following to review more in depth: the Public Library of Charlotte and Mecklenburg County, a large public library system in North Carolina; Harvard Libraries, Harvard University; and the New York Public Library, Research Collection.

**Public Library of Charlotte and Mecklenburg County (PLCMC) -- <http://ipac.plcmc.org/>**

This catalog was very interesting to examine. My initial impressions of the look and feel was quite positive. The designers are using the tab design made popular by "Amazon.com". The PLCMC's catalog is a two-tab structure simply containing "Search Catalog" (which it defaults to) and "My Account". The main catalog page is simple and easy to understand, and does not feel cluttered. The colors are pleasant, and are not overwhelming or glaring. There are three persistent links in the top right hand corner that follow the user wherever they go in the catalog. These are "My List", "Login", and "Help".

“My List” allows a patron to save search results to a list that will be retained in the users file. While this is a great feature, a patron must be logged into their account in order to have results saved from session to session. This fact is only mentioned in the more detailed “user’s guide”, which is found from the help screens. If a patron does not log in the list is saved only for that session. As mentioned before, the “Login” link is always in the top right-handed corner of the page, and it is fairly self-explanatory, allowing a user to log in using their library card number. However, as patrons may not realize they must login before taking full advantage of the “My List” feature, they simply need to make the login requirement more apparent. Aside from that problem, it is a great feature. A search list is saved for ten or more days. It is only after ten days of complete inactivity that the entire list is deleted, therefore a patron could conceivably go in and add or remove items on a weekly basis and the list would be retained indefinitely. A patron can also easily print or send the list as an email.

The last consistent link is “Help”, and this feature is nicer than most help screens. It is page dependant help, meaning that it gives you help for the page you are currently on. This is much more useful for the user. Help screens can be overwhelming and patrons often need *help* to find what they need in the Help menu. When the Help screen opens, a user is met with a small, separate window. The separate window is important as a patron can refer back to the page they are having problems with while reading the help instructions. There is also a link to a “User’s Guide” which takes you into a more traditional help program that you can search and/or view and index to all help items.

As mentioned before, the main catalog page defaults to the “Search Catalog” tab. From this point the patron has a wide variety of options, which is really the strength of this OPAC – allowing the users to do much in a confined space. Aside from the basic and advanced search, patrons also have some very interesting features available to them. First is the “Hot Titles” list. This link takes you to a page where you can see a list of the most requested books in the library. These lists are fiction, non-fiction, videos, and forthcoming titles. You can go into the lists, which vary in length (though I couldn’t determine why), and see a brief record for each, including a cover image if available. From the brief display you can request the title, or add it to your “list”. To find out more information you can click “see detail” and find

out how many holds and how many copies are available, you can also request the title from this page if you wish.

Three links in this first tab take the patron out of the catalog completely -- and place them on other pages on the PLCMC site. While these are useful pages, it may be a bit confusing to the patron to be taken out of the catalog. These links are: "Recommendations" which takes a user to the Reader Advisory Services page, "Ask a Librarian" which links to a page with a variety of reference options, and "Need a Library Card?" which allows a user to sign up for a card via the web. Opening another browser window for these pages could perhaps lessen possible confusion.

The other tab is dedicated to "My Account". This area allows patrons to renew books, verify and update personal information, view holds, and examine any fines or blocks that may be on their account. This is a very useful service for patrons, as it is great to be able to renew your books from the comfort of your own home at 3am. As one can see there are many great features for patrons, however, it may be at the expense of a more finely tuned searching ability within the catalog.

The catalog allows for basic and advanced searching. The Basic search allows the patron to search title, subject, author/performer or series – either using keywords or by browsing. For multiple words in a keyword search an "and" is implied, though not explained. For the keyword search, the results are brought back in a numbered list as brief displays. Like the "hot titles list" a patron can add the item to their "List", "Request" the item, or see the full bibliographic display. Another nice feature of "My List" is that when a patron clicks to add a record to the list, the "Add" button then changes to "Remove". This allows the patron to know at a glance whether they have already saved this title in their list. This will be true for as long as their list is saved. So if they do further searching on another day, they can see quickly from a results list what titles they have already added.

When a patron goes to the full bibliographic display they are met with a design that again reflects Amazon.com. Bibliographic information is shown first, with holdings/item information after. There is a left-handed sidebar that allows for easy browsing by title, author and call number. A patron can also click on the title or subject headings to be put into a browse list. However, this isn't apparent unless you move

your mouse around. In general, this entire catalog uses links that are not underlined, so patrons must know that a difference in color may mean a potential link. This isn't the best usability practice, but users are becoming more accustomed to moving the mouse around, and after discovering it once, it sticks with you. From each record a patron can request, add to list, or email the title.

Browse searching brings you to a standard browse results list. You click into the list and it brings up a listing of brief records. While it is not obvious, the closest hit to your search is at the top of the browse list. It would be more helpful if the search term were arranged into the list, perhaps in a different color. However, as the search terms are persistent in a box above, it is not as critical. This search box follows the user throughout the search/display screens. This is very nice in that a user could quickly edit their search or note any typos if the results did not turn out how they had expected. There is also a "refine search" link that takes you back to the initial search screen.

The Advanced search page is not terribly advanced. It searches the same indexes as the basic search, with the addition of ISBN/ISSN. It simply allows you to fill in search terms in multiple search fields. However, it has no ability to use "or" and "not" searching. It also allows patrons to combine browse terms with keyword terms in the same index. This then turns everything into an "and" search, which is just a bad idea. The only positive feature of the advanced search is it is here that you can limit to location – so that if you were sitting in a particular branch you could find out what is in the building. Other than that the advanced search was very poor. I got very excited about all the "features" of the catalog – and I still feel they are useful, but a catalog should have the ability to do complex searching, even if the average patron may not need to. I would think that this would be very limiting for librarian staff as they are used to conducting complex searches for patrons.

**Harvard Libraries Catalog (Hollis)** – <http://hollisweb.harvard.edu/>

What a difference between public and academic libraries. At first glance, this is a simply designed catalog. There are no tabs, frames, etc. The color of the main search page is a muted light purple. As you go through the various subsets of the catalog you find that the color changes to other light varieties.

This allows a patron to know they are searching a certain area of the catalog – different from the full catalog. People learn and associate colors quite quickly. Patrons often remember that a certain book was red, but they won't remember any other information about the book. In terms of the catalog, users learn that light peach is associated with e-resources, light blue with Reserves materials, etc.

There is a top toolbar that contains text links, making it most compatible with a variety of browsers. This top toolbar is consistent from page to page. There are sixteen different links in the top toolbar alone, but they are arranged in an organized way that a user can understand, and become comfortable with quickly. In the far left corner there are links back to the Harvard homepage and the Library's homepage. The special features of the catalog are listed on the right side of the top toolbar, these include: "Your Account", "Help", and a "Comment Form". While I could not access "your account", I assume it covers the basics. Help takes you to a mildly confusing help index. The "comment form" is just that, a form that allows patrons to give feedback about the OPAC. (This OPAC is new for Harvard; they just came up on their current system in July of 2002.) Other helpful features are a link for search history and a results list. The results list is a bit odd. It isn't a "My List" type option (which one might expect) – but instead it merely takes you back to the last active results list. After playing with this for quite some time I still found it an odd feature. Also once in a results list you can add things to another "list", but you can't get to the "Show List" link unless you are looking at brief records. The final distinct feature of the catalog is the ability to alter the display options. This feature allows a user to determine how many results to display, whether to view them in a brief, short or title display, etc. It is a nice customizing feature for the catalog.

There are four areas of the catalog that can be searched; the full catalog, journals, reserves, and e-resources. From these four areas a user can do a basic search, and expanded (or advanced) search, and a command search. On each screen there are "Search tips", as well as helpful links to information on "when to use browse" and "when to use keyword". Within the three subsets (journals, e-resources, reserves) a user can impose limits on the search by location, format, and year ranges (though at the moment it can't handle ranges higher than 9 years). There are more helpful tips instructing users on how

to select entries for limits, choose multiple limits or jump to a certain area in the limit list. To the right of each search box are examples of search terms, to aid the user. These change dynamically when a user chooses a different search field. The search fields also change somewhat depending on what subset of the catalog you are searching (e.g. “course number” for reserves).

On the basic search page there is a browse and keyword search. Browse is first, followed by keyword. On the average 17-inch monitor both search options appear without scrolling or “above the fold”. The “Expanded Search” acts as the advanced search, allowing for more complex searching. It allows a user to combine up to three search terms with varying search fields, combined with and/or/not, and the search can be done as word or phrase searching. Command searching allows users a more advanced search as well, combining as many search fields as they want on a command line. The various limits can also be used in some of the advanced and command searches. In general, these searches are clear and understandable in their design.

The result lists display in a couple different ways. For a browse search it takes you in to a browse list containing a browse of the selected index, along with the number of records for each result. The list is uncluttered and looks like a simple sheet of paper. The basic search boxes are included at the bottom of the results page for ease in modifying or changing your search, however, there are no persistent search terms to make it even easier and a patron must retype each time.

When a user goes into a particular result in the browse display, they get a brief display list. The brief results page is set up in a list/table format displaying author, title, year and format. From this screen you can mark records, however upon entering the brief result list, things look a bit confusing at first. The confusion surrounds the ability to create a list of results – similar to “My List” in the PLCMC example. There are several icons/buttons in yellow that are a bit visually jarring at first glance. They are instructing users to “confirm results” when attempting to add them to their “list”. It seems that simply marking the records does not save them to the list. It is in fact, a three-step process of marking, confirming, and then adding to the list. I’d say that this is a software problem as they are doing a lot to clutter their display to ensure people do this correctly. It isn’t an intuitive process at all. It is certainly something that should be

altered, and again, you get the sense they are working on it. Regardless, you can add records from the brief display list, or you can go into the full record and add them from there. You can manipulate these lists quite a bit, creating different subsets of the list – useful if researching multiple topics. You can save, print, or email these lists.

Clicking on the title in the brief display takes you to the full display for that title. The full display lists all of the bibliographic information and provides a link to the holdings/availability. Ideally, the holdings/availability information would not be so buried. If they could move this information into the brief display list it would be more helpful when browsing, particularly for patrons looking for that last minute resource. From the full display the user can click on author, title, and the subject headings in order to browse on those indexes. You can also view the MARC record from the full display.

Overall, this catalog has a very good search function. The only confusing aspect of it was the marking records and saving them to your list. Once you did this a few times it would make sense, but it would still be a longer process than one would hope for. The other “results list” link also doesn’t seem particularly helpful, but it is not hurtful either.

**New York Public Library** -- <http://catnyp.nypl.org/>

This is a public library with an academic feel, which is why I chose to review it. There are two distinctive catalogs for the New York Public Library system: CATNYP, which serves the research libraries in Manhattan; and Leo, which serves the system’s branches. I will be reviewing CATNYP.

The first thing to know about the research library is that the collections do not circulate. Therefore, they have not worked any type of “my account” feature into their OPAC. The research collection is housed in four buildings in Manhattan. Ideally, these two systems would be eventually combined into one catalog with the ability to restrict your search to the research or the circulating collection. The Boston Public Library has a setup similar to the NYPL, but you can search both collections at once and it is very helpful.

Like the other catalogs chosen, the initial search screen is simple and straightforward. They also have a simple use of color, to accent, but not overwhelm. The page is not big on design, with the top header simply being the NYPL logo accompanied by a photo of one of the two stone lions outside the main library. The search options are presented in a simple shaded table. A user can search “words”, author, title, subject, journal title, call number, gov. doc. number, music number, and RLIN/OCLC number. They included a helpful note next to “subject”, informing users that by subject they mean “Library of Congress Subject Headings” – an important distinction. There is also a link to the “Dance Collection Catalog”, which is the only subset of the collection that can be searched separately.

After the initial table, the main page lists a few paragraphs that people may or may not read. It is widely known that people don’t tend to read on the web in this context. However, if a user did take the time they would find out that the catalog consists of holdings from 1972, as well as those that have been added during the ongoing recataloging projects. For the complete holdings users must reference an 800 volume “Dictionary Catalog of The Research Libraries”. It will be wonderful when the whole collection is available in the online catalog, but this will take years. (They listed no time frame on their web page).

One thing I quickly noticed was that there are no separate help screens for this OPAC, instead when you go into any of the searches you are met with helpful tips underneath the search box. The system appears straightforward enough that perhaps there is not a need for a greater help menu. In all cases except “Words” searching, a user has just one text box to work with. Words/keywords is the most powerful, and in fact really serves as their advanced search. They are currently advertising that they have recently added “new features”, and in fact there are a lot of options with that search.

From the words/keyword search you can do word searching, command searching, and phrase searching. It defaults to phrase searching but you are instructed to use “and, or, not” to override phrase searching. You can also apply a number of pre-search limits, these are: language, format (fifteen different formats), publication type (book or periodical), publisher, place of publishing, and years. You can also decide to sort by date, alphabetical, or relevance. At the bottom of this search page are extensive search tips and examples. The key “help” words (e.g. adjacency, operators, proximity) are also links and they go

to even greater explanation of these searching strategies. It returns a limited number of results in a brief display list.

For the other searches, if it finds an exact hit then it will return a limited number of brief results, however, if it doesn't find anything it drops the user into a browse list. This is good on one hand, in that it never allows the user to think that there is *nothing* out there, but on the other hand it might confuse people to be dropped ¾ of a way down the page on a browse list. Particularly as depending on your monitor, you may have to scroll down to see the "your search would be here" text in red. It is good to see what is around your search, particularly in the case of a misspelling or simple typo, but perhaps it would be better if it wasn't so far down the list -- around the fourth or fifth spot with the ability to do "previous screen" if you needed to. For both the browse and brief result lists you can chose the "extended display", which allows you to see a bit more of each record. Instead of just title, year and number of entries you also get brief holdings and/or location information.

To view the full display you simply click on the appropriate title. You are then met with complete bibliographic information with as many fields hyperlinked as possible. Like the other catalogs, this allows for continued browsing by author, call number, subject headings, etc.

There are several ways to modify your initial search. For title and subject searches there is a button in the top toolbar that allows you to do "search as words" – what this basically does is turn your search into a keyword search in case you aren't getting the results you thought you would. You can also limit finite result lists by the same limits as those found in the initial "words/keyword" search. You can further modify the search by adding more limits such as words in title, author, and subject. You can also modify your search using search box that lives at the top of your results. This page has persistent search terms so you don't have to remember your search terms. There is also a pull-down search history box at the top and bottom of the result pages as well.

Other handy navigating features include the usual "next page/previous page" and the "jump to" button, which allows you to easily get to another spot in a long list. You can also mark records and "save" them for use during the current session. One possible problem with this might be that the "save"

button is at the bottom of the list – it might be better to put it both at the top and bottom. Once records are saved they can be “exported” to either an email file, your hard drive, or to a printer.

This catalog does not have lots of bells and whistles, but it has a strong searching capability, which is really the most important part of an OPAC. It is easy to navigate from search to search and in and out of the results list.

## **Conclusion**

Generally speaking, these catalogs have many similarities. All allowed the marking of records to save to a list. The two with circulating collections both had “your account” areas that allowed users access to their library accounts. All the catalogs used designs that were simple and clear – with a subtle use of color. The difference really came when looking at the search capabilities; the more academic the collection – the greater the number of search options and possible search strategies. Harvard had the most indexes that could be searched on, along with the most distinct subsets of the catalog to search within. The NYPL research collection was not as strong as Harvard, but it still allowed for powerful searching. The PLCMC unfortunately had very limited advanced searching. It really seemed to focus on basic searching and special “features” that would serve as suggestions to the public for possible reading material. It also chose a design that while clear, was modeled after Amazon.com – a very successful commercial site. Both Harvard and the PLCMC are recently up on new OPAC systems and there is always tweaking and changing that goes on with a new system. It would be interesting to check back in six months to see if any of the issues I have mentioned in the above review have been addressed. Reviewing OPACs is a great way to get ideas for both what to do and more importantly, what *not* to do.