

The following includes descriptions of various problems we have been experiencing, both as staff and reported by users, with various functions of iPortal. As a strictly low-residency college with semester long loan periods, we face unique challenges in customizing the system to work well for everyone.

In this document you will find screenshots and descriptions of the problems and potential solutions. These suggestions deal primarily with request functions from login to outputs. Some of the issues may be very simple, others considerable, and what we would like to know are the following:

1. What of this is possible to change?
2. What elements would you need to manipulate and what can we do ourselves?

Though it is stated often throughout this document, I'd like to state that the language used in these examples has not been discussed by the library staff and is only meant to serve as a place holder for some kind of language change we would like to see in the future. We would like to see what we can change before we meet over that issue. Ideally, we would also like to user test any changes before they are implemented, but again, we would like to wait to do that until we know what can be changed.

**After your staff has had a chance to review and discuss the contents of this document we would like it if there could be some time set aside with a VTLS representative at the staff discussion section of the VUG meeting to go over these potential changes.**

If you have any questions, please let me know. Thank you.

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## 1. Login Screen:

**1.1.** While there are several ways to login, none are given prominence. This results in students frequently trying to make requests from the OPAC and not understanding why they can't. Our students must be logged in for requests, so we would like to get them into the habit by making the suggestion to log in more instructive. A more prominent login message and method will encourage students to login from the start, reducing problems later. Of course, there will still be users who do not follow the instructions at the start, so we would like to keep the small login in the upper right of the screen persistent throughout. Any wording used in the examples is merely a placeholder.

### 1.1.1. Current Login Screen

[ Log In ]

## D. Pratt Library

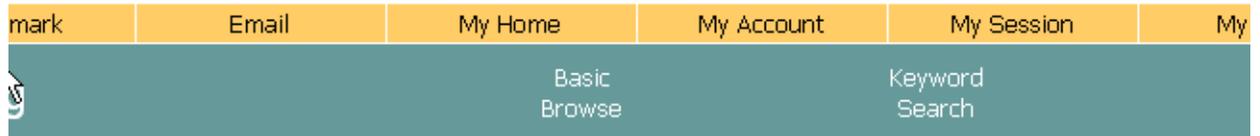
mark	Email	My Home	My Account	My Session	My
		Basic Browse		Keyword Search	

**You must log in to make a request.**

Basic Browse	Search for items by author, title, subject or call number.
Keyword Search	Search for items using relevant words in an author, title, subject, or entire record.
Thesaurus Search	Search for author, title, and subject headings using relevant key words.
Log In   My Account	View items borrowed, fines owed, and titles requested by you.

**1.1.2. Alternate Login Screen**[ [Log In](#) ]

## D. Pratt Library



**Goddard Community**  
[Please Log In to Your Account Here First!](#)

Basic Browse	Search for items by author, title, subject or call number.
Keyword Search	Search for items using relevant words in an author, title, subject, or entire record.
Thesaurus Search	Search for author, title, and subject headings using relevant key words.

**1.2.** The current message to “login to make a request” and “log in” link in the upper right a constant. We would like to see some kind of feedback to the user that they’re logged in as well as get students to log out when they are finished. The box that says “End” in the menu is not consistent with what users expect for logging out of an authenticated session. We would prefer that it be removed or changed to say “Log Out” instead. In the example below we have made both the upper left login link change to log out, and also changed the message in the box to reflect that the user is already logged in and encourage them to log out when they are finished. Though the “End” box is not shown, we would like the same treatment. Language used is not definitive.

**1.2.1. Logged In Screen**[\[Log Out\]](#)

## D. Pratt Library

mark	Email	My Home	My Account	My Session	My
		Basic Browse		Keyword Search	

**Thank you! You're already logged in**  
**[Please Log Out When You are Finished](#)**

**Basic Browse**

Search for items by author, title, subject or call number.

**Keyword Search**

Search for items using relevant words in an author, title, subject, or entire record.

**Thesaurus Search**

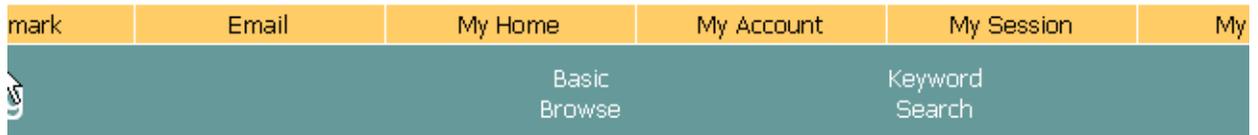
Search for author, title, and subject headings using relevant key words.

- 1.3.** When a student is logged out of the system because of an expired session, there is no indication that they've been logged out. They are simply returned to the start screen. We would like to see a message that indicates when students have been logged out by the system because of an expired session.

**1.3.1.** *Expired Session Screen*

[ [Log In](#) ]

## D. Pratt Library



**Your session has expired**  
[Please Log in Again to Continue](#)

Basic Browse	Search for items by author, title, subject or call number.
Keyword Search	Search for items using relevant words in an author, title, subject, or entire record.
Thesaurus Search	Search for author, title, and subject headings using relevant key words.

**2. Keyword Search Screen:**

**2.1.** There is an issue here of too many options too far spread out:

- a.** Many options in the drop-down menus are not relevant to the Goddard collection. We also find some options are never used, such as Context Date.
- b.** Other necessary options, like the electronic resource search, are pushed below the fold. Also, we are not sure why this needs to be a separate search option. It seems that it is, by nature, a filtering option.
- c.** The use of white space is inefficient, pushing options too far apart so that they appear scattered.
- d.** The quick search seems like an afterthought. For this to be useful, students need to see it immediately, or set as a separate option. **How would we prefer this?**

**2.1.1** Current Keyword Search Screen

The screenshot shows the 'Keyword Search' interface. At the top, there are three search input fields, each followed by 'in the' and a dropdown menu currently set to 'entire record'. To the right of these is a dropdown menu for search scope, currently showing 'None' and a long list of options including 'Archival/Manuscript', 'Comm.Info', 'Comm.Info event', 'Comm.Info individual', 'Comm.Info organization', 'Comm.Info program', 'Computer file', 'Manuscript', 'Manuscript Serial', 'Manuscript Serial-Braille', 'Manuscript Serial-Large print', 'Manuscript Serial-Microfiche', 'Manuscript Serial-Microfilm', 'Manuscript Serial-Microopaque', 'Manuscript-Braille', 'Manuscript-Large print', 'Manuscript-Microfiche', 'Manuscript-Microfilm', and 'Manuscript-Microopaque'. Below the search fields are filter sections: 'Nature of Contents Filters', 'Language Filters', 'Publication Date', and 'Place of Publication Filters'. The 'Place of Publication Filters' section is highlighted with a red box and labeled 'A'. At the bottom, there are two buttons: 'Electronic Resource Search' (labeled 'B') and 'Quick Search' (labeled 'D'). Red arrows and labels 'C' indicate the layout and spacing issues mentioned in the text.

Use asterisk to search for a term and its variations, e.g. teach\* cover  
 If you only want results that match an exact phrase, put quotation marks around the phrase.

Any filters that are selected below will be combined with My Filter

Nature of Contents Filters  
 None  
 Including  Excluding

Language Filters  
 None  
 Including  Excluding

Publication Date  
 -

Place of Publication Filters  
 None  
 Including  Excluding

Context Date  
 -

Electronic Resource Search      Quick Search

**2.2** Dropdown menu options in our alternate screen are meant to serve as an example of how these lists could be scaled down to benefit our students, not as a definitive list of what we'd like to see. In the example below we have:

- a.** Limited the options in the drop down menus and also to add options that are more relevant to our users, like a filter for Goddard Authors once we've established a formal heading for it. We've also limited the available filters.
- b.** Reduced the amount of white-space to fit all of the relevant information above the fold without sacrificing readability.
- c.** Eliminated the special search for "Electronic Resources" that appears below the fold because we believe that it should be treated as a format filtering option using the same unique identifier. This search is not often used because students are not aware that it's there unless they scroll.
- d.** Though it is not shown, we have removed the quick search from this screen.

**2.2.1** Alternate Keyword Search Screen

Keyword Search ?

Search for  in the  AND  Search

search for  in the  AND

search for  in the

Use asterisk to search for a term and its variations, e.g. teach\* covers teach, teachers and teaching.  
 If you only want results that match an exact phrase, put quotation marks around your search terms.

Narrow this search further by using the following filters:

**Contents** **A**

Including  Excluding

**Language**

Including  Excluding

**Format**

Including  Excluding

**Publication Date**

-

**Fiction** **A**

Non-Fiction  
 Biography  
 Thesis/dissertation  
 Musical Recording  
 Non-Musical Recording

- Book
- Goddard Authors
- Electronic Resources / Ebooks **C**
- Visual Material
- Videocassette
- DVD video **A**
- Sound Recording
- CD audio
- Cassette recording
- Musical Score
- Serials / Magazines / Newspapers
- Internet Resource
- Computer File
- Map

**3.1.** There are a number of issues with the search here that effect how our students find the information they would like to request.

- a.** The default sort appears to be by call number, but the sort box says “none.” There needs to be some kind of feedback to the user.
- b.** When the user clicks on an author’s name or a title link, it takes them to a browse list of authors or titles. The expected result is a list of works by an author or information about a title. To get that list in both cases, it requires an extra click.
- c.** Meanwhile, the links to full and item views are buried on the left. Some users will not understand that they need to click on a title/author even if that is changed, so these links need to be a more obvious for users to obtain the record.
- d.** The “Add to Cart” option is buried on the left where users may not see it initially and the cart option buttons are too spread out at the top of the page.
- e.** We are unsure of what the location and item classes are actually determining in the catalog. This makes it difficult for us to see whether we are using these designations to their greatest advantage. Regardless, we would like to know how difficult it would be to remove and add new items to these lists so that we can change this language.
- f.** **When an item is out, there is no indication to the patron that they can still request the item and get it another way. As we have semester long due dates, this is important information for the student to have when requesting materials.** Make multiple options to present at a fuller meeting, marked in the current but not in the alternate image yet.
- g.** We are unsure about whether the “Save Query for SDI” button is absolutely necessary. Even if it is, it isn’t telling a user what it’s for.
- h.** The links to “return to the last” menu is buried at the bottom of the page. To be useful it needs to be above the fold where it will be used by students.

3.1.1 *Current Results Screen*

List of Titles ?

**A** Sort by:  Sort  
 Ascending  Descending

Save All To Cart

**G** Save Query for SDI

You searched Goddard College - Author: berman, san  
Records 1 through 2 of 2

Save to Cart Check 1-2 Clear All

- 1 [Animals in exile: imagery and theme in Cap...](#)
- 1 [The animals in that country \[by\] Margaret A...](#)
- 1 **B** [Animals, men, and myths ; an informative a...](#)
- 1 [Animals of East Africa; the wild realm, by L...](#)  
Publications Division.

**1**  
[full view](#) **C**  
[item view \(1\)](#)  
 Add to cart **D**

Number Available: 1  
Available At: Circulating **E**

**Author** [Atwood, Margaret Eleanor, 1939-](#)  
**Title** [The animals in that country](#)  
**Call Number** PR 9199.3 .A8 A83  
**Publisher** [Boston, Little, Brown \[1969, c1968\]](#)

**2**  
[full view](#)  
[item view \(1\)](#)  
 Add to cart

Number Available: 0 **F**

**Author** [Berman, Sanford, 1933-](#)  
**Title** [Prejudices and antipathies: a tract on the LC subject heads concerning people.](#)  
**Call Number** Z695.U48 B45  
**Number**  
**Publisher** [Metuchen, N.J., Scarecrow Press, 1971.](#)

**H** Return to the last:  Return

**3.2** The list below describes the changes seen in the alternate screen. Please keep in mind that language used here is not definitive and only serves as an example of what we'd like to see there. Please also keep in mind that the full view used as an example here does not take into account changes we'd like to see on the issue of full/item view discussed in section 4.

- a.** Assigned a default sort.
- b.** Made clicking on the title lead to the full view of the item. Please note that the piece of full view shown does not reflect changes we'd like to see on that screen. It is merely an example of the idea.
- c.** Though it is not shown here, click on the author name would lead to a list of all Goddard holdings by and/or about that author.
- d.** We've changed the Full View and Item View links to give them greater prominence via typography and a single entry link.
- e.** We've shown the student that the Goddard copy of this item is out, but that an alternate copy is available via ILL. This way the student understands that it is still possible to get this item. Show a couple of options for this and we'll decide which to go with.
- f.** We've replaced the SDI button with the "return to previous search" making it more accessible. If the SDI button is necessary, then we would like to change the wording to something more useful and still keep the previous search more available.

### 3.2.1 *Alternate Results Screen*

List of Titles 

previous set | [1](#) [2](#) [3](#) [4](#) [5](#) | next set

Sort by:    
 Ascending  Descending

You searched Goddard College - entire record: gore  
 Records 1 through 10 of 48

Return to the last:

- Save ALL Records to Cart
- Save Records on THIS PAGE to Cart
- Save CHECKED Records to Cart

<b>Request</b>	<input type="button" value="Request"/>
<b>Author</b>	Vidal, Gore, 1925-
<b>Title</b>	Matters of fact and of fiction : ess
<b>Call Number</b>	AC 8 .V43

 1

Check to select this record  
 Number Available: 1  
 Available At: Pratt Stacks (or Special Collections or Port Townsend, etc)

[View this Item](#)

**Author** Vidal, Gore, 1925-  
**Title** Matters of fact and of fiction : essays 1973-1976 /  
**Call Number** AC 8 .V43  
**Publisher** New York : Random House, c1977.

 2

Check to select this record  
 Number Available: 0

*We may be able to get this item for you another way. Please submit a request and specify your preferences there.*

[View this Item](#)

**Author** Gore, Albert, 1948-  
**Title** Earth in the balance : ecology and the human spirit /  
**Call Number** GF 41 .G67 1992  
**Publisher** Boston : Houghton Mifflin, :c1992.

- 3.3.** We find that a lot of electronic resources are requested because they look like any other book in the system. For consistencies sake, the alternate screen will reflect any changes in the results list discussed in section 3.2.
- a.** We would like to show the URL for the e-resource in the results list. Currently, the Profiler allows this field to be shown, but in choosing it we would also have to show LOC enhancements or any other URL in the 856 field of any record. We would like to set up some kind of if/then conditional statement where if the record is for an electronic resource, then show the URL in the 856 field. We would also like this tag to read more like the MARC tag. Instead of “multimedia” we’d prefer something like “electronic location/access” although we are not decided on wording yet.
- b.** If it’s possible, we would like the option to request e-resources to be removed entirely in a similar if/then scenario. We have tried to set this via Profiler Settings under “Goddard College + Education Matrix” where we have set the system not to “allow requests for bibs without items” but the button still shows up and when students try to make a request they are shown a error screen(a discussion of the denied request screen that occurs with this and other unsuccessful requests will be discussed in section 5.5). If this is not possible, we would like requests for e-resources to generate a special automated message indicating the material is available online.

**3.3.1** *Current Electronic Resources Results*[full view](#)[item view \(2\)](#)[Add to cart](#)

Number Available: 1

Available At: Circulating

**Author** [Didion, Joan.](#)**Title** [The year of magical thinking /](#)**Call Number** PS3554.I33 Z63 2005**Publisher** [New York : A.A. Knopf, c2005.](#)[full view](#)[Add to cart](#)**Author** [Didion, Joan.](#)**Title** [The year of magical thinking \[electronic resource\] /](#)**Call Number** PS3554.I33 Z63 2005eb**Publisher** [New York : A. A. Knopf, c2005.](#)**3.3.2** *Alternate Electronic Resources Results*[View  
this  
Item](#)

Number Available: 1

Available At: Circulating

**Author** [Didion, Joan.](#)**Title** [The year of magical thinking /](#)**Call Number** PS3554.I33 Z63 2005**Publisher** [New York : A.A. Knopf, c2005.](#)[View  
this  
Item](#)

Available At: Ebrary

**Author** [Didion, Joan.](#)**Title** [The year of magical thinking \[electronic resource\] /](#)**Call Number** PS3554.I33 Z63 2005eb**Publisher** [New York : A. A. Knopf, c2005.](#)**Electronic Location & Access** <http://gnet.goddard.edu:2048/log>

### 3.3.3 *Potential Electronic Resource Request Error Message*

## The Eliot D. Pratt Library

**The item you are trying to request is an electronic book. It is available to you online.**

**Please return to the item and click on the link for Electronic Location & Access.**

Diagnostics: 4085

Diagnostics: 4036

[Return to Record](#)

### 3.3.4 *Current Profiler Settings*

**Goddard College + Education Matrix** ? X

Default Date: 7/11/2008

Default Time: 10:00:00 PM

Processing Fee

Fee: \$.00

Cancelled At Check-in: \$.00

Used For Block: No

Item Price Fee

Remains At Check-in: \$.00

Used For Block: No

Patron Record

Expiration Period: 10 Years

Delete Period: 10 Years

Hold Allowed When Available Item Exists At Log-in Location: No

Hold Allowed When Available Item Exists At Another Location: No

**Allow requests for Bibs without items: No**

**B**

Apply To Save Cancel

Last Modified 1/14/2008 9:33:16 AM

#### **4. Full View and Item View**

- 4.1.** The two separate views are confusing to our users. Information they would expect to be in one is in the other and visa versa. We would like to change the following issues:
- a.** There are no clues as to what information will be available on which screen when users click through, causing confusion about the item and questions about location and availability that could be easily avoided.
  - b.** The request and save options are inconsistent and too far apart on both screens. These are related functions and should be together.
  - c.** The basic information provided reads in a different order on different views, which is confusing to users.
  - d.** Requesting from the full and from the item views produce different results. This confuses both the students and librarians. When a student requests from the full level, they cannot specify a volume or specific copy, which might be necessary, causing us extra steps in figuring out what. If it doesn't matter, but they make an item level request, that request is linked to a specific copy, requiring extra steps from us to sort out which copy and change it if necessary.

**4.1.1** Current Full View Screen

**Full Record** 

[full view](#)

| [item view \(1\)](#)

[first record](#) | [previous record](#) | [next record](#) | [last record](#)

---

Record 1 of 1

You searched Goddard College - Title: matters of fact

**Request**

**Author** [Vidal, Gore, 1925-](#)

**Title** **B** [Matters of fact and of fiction : essays 1973-1976 / Gore Vidal.](#)

**Call Number** AC 8 .V43

**Publication** [New York : Random House, c1977.](#)

**Material Information** [viii, 285 p. ;](#)

**C**  
The call number is in a different place than it was on the full view. It's inconsistent.

**4.1.2** Current Item View Screen

**Item List** ?

[first record](#) | [previous record](#) | [next record](#) | [last record](#)

[full view](#)

| [item view \(1\)](#)

---

Record 1 of 1

You searched Goddard College - Title: matters of fact

**Title** [Matters of fact and of fiction : essays 1973-1976 /](#)

**Author** [Vidal, Gore, 1925-](#)

**Publication** [New York : Random House, c1977.](#)

**Material** [viii, 285 p. ; 25 cm.](#)

Items 1 - 1 / 1

**1**

**Request**

**Location**

**Call Number**

**Number of Pieces**

**Status**

**Add to cart**

Circulating

AC 8 .V43

1

Available



**C**

The call number is in a different place than it was on the full view. It's inconsistent.

**4.2.** Here we have provided a couple of possible ways to combine the two views into a single screen. Language has been changed to be more meaningful to our patrons, as on other pages, but is not necessarily the language we would like to see used. We have made the following alterations to both screens:

- a.** Condensed the item and full views into a single view where all of the information is easy to see.
- b.** Since the students are looking at a single item, we would like the “save to cart” check mark removed. Students regularly complain that they saved to the cart but it didn’t show up because they checked or clicked the button, but in actuality they must do both. The request and save buttons have been placed together so that it is clear what the options are.
- c.** The item availability and location have been grouped together with each instance of an item and each item has a checkmark to allow for selection (In the case of the record attached to a single item there would be no check marks at all, ideally). There is only one button for request and save to cart to streamline the process. **Does there need to be an explanation here, especially for multivolume sets where there are so many that the request/save buttons will be pushed below the fold (maybe add a set to the top?)**

For the purposes of side-by-side comparison, all three ways that a student might see this item information are represented in one graphic. The wavy dotted lines indicate where the switch to a new view occurs; normally they would not appear on one screen like this.

**4.2.1 Alternate View Screen Example A**

first record | previous record | next record | last record

You searched Goddard College - Title: matters of fact

**Full Record**

**Title** [Matters of fact and of fiction : essays 1973-1976 /](#)  
**Call Number** AC 8 .V43  
**Author** [Vidal, Gore, 1925-](#)  
**Publication** [New York : Random House, c1977.](#)  
**Material** viii, 285 p. ; 25 cm.

**Item List**

Item(s) - 1

**Status** Available  
**Location** Pratt Stacks  
**Number of Pieces** 1

Request

Save to Cart

**Item List**

Item(s) - 2

**Select this item**  
**Volume** v.1  
**Status** Available  
**Location** Pratt Stacks  
**Number of Pieces** 1

**Select this item**  
**Volume** v.2  
**Status** Available  
**Location** Pratt Stacks  
**Number of Pieces** 1

Request

Save to Cart

**Item List**

Item(s) - 0

**There are no items attached to this record.**

**If it is an electronic resource, you can access it online by clicking on the link for Electronic Location & Access above in the Full Record.**

**If you have any questions, please contact a librarian at:**

Phone - (802) 322-1604

Email - [lits@goddard.edu](mailto:lits@goddard.edu)

**4.2.2 Alternate View Screen B**

first record | previous record | next record | last record

You searched Goddard College - Title: great books of the western

**Full Record**

<b>Title</b>	<a href="#">Great books of the Western World</a> . Robert Maynard Hutchins, editor in chief.
<b>Call Number</b>	AC 1 .G72
<b>Publication</b>	<a href="#">Chicago, Encyclopædia Britannica, 1955, c1952]</a>
<b>Material Information</b>	54 v.
<b>Notes</b>	Goddard is missing v. 1, 21, 29.
<b>Notes</b>	Includes bibliographies.
<b>Added Author</b>	<a href="#">Hutchins, Robert Maynard</a> ,
<b>Subject</b>	<a href="#">Literature Collections</a> .
<b>Subject</b>	<a href="#">Literature Indexes</a> .
<b>Table of Contents</b>	1. The great conversation, by R.M. Hutchins. — 2. The great ideas, v. 1 : angel to love. — 3. The great ideas, v. 2 : man to world. — 4. The Iliad of Homer. The Odyssey. — 5. Aeschylus. Sophocles. Euripides. Aristophanes. — 6. Herodotus. Thucydides. — 7. Plato. — 8. Aristotle, v. 1. — 9. Aristotle, v. 2. — 10. Hippocrates. Galen. — 11. Euclid. Archimedes. Appollonius of Perga. Nicomachus. — 12. Lucretius. Epictetus. Marcus Aurelius. — 13. Virgil. — 14. Plutarch. — 15. Tacitus. — 16. Ptolemy. Copernicus. Kepler. — 17. Plotinus. — 18. Augustine. — 19. Thomas Aquinas, v. 1. — 20. Thomas Aquinas, v. 2. — 21. Dante. — 22. Chaucer. — 23. Machiavelli. Hobbes. — 24. Rabelais. — 25. Montaigne. — 26. Shakespeare, v. 1. — 27. Shakespeare, v. 2. — 28. Gilbert. Galileo. Harvey. — 29. Cervantes. — 30. Francis Bacon. — 31. Descartes. Spinoza. — 32. John Milton. — 33. Pascal. — 34. Newton. Huygens. — 35. Locke. Berkeley. Hume. — 36. Swift. Sterne. — 37. Henry Fielding. — 38. Montesquieu.

**Item List**

Item(s) - 1

<b>Status</b>	Available
<b>Location</b>	Pratt Stacks
<b>Number of Pieces</b>	1

[Request](#)[Save to Cart](#)**Item List**

Item(s) - 2

 **Select this item**

<b>Volume</b>	v.1
<b>Status</b>	Available
<b>Location</b>	Pratt Stacks
<b>Number of Pieces</b>	1

 **Select this item**

<b>Volume</b>	v.2
<b>Status</b>	Available
<b>Location</b>	Pratt Stacks
<b>Number of Pieces</b>	1

[Request](#)[Save to Cart](#)**Item List**

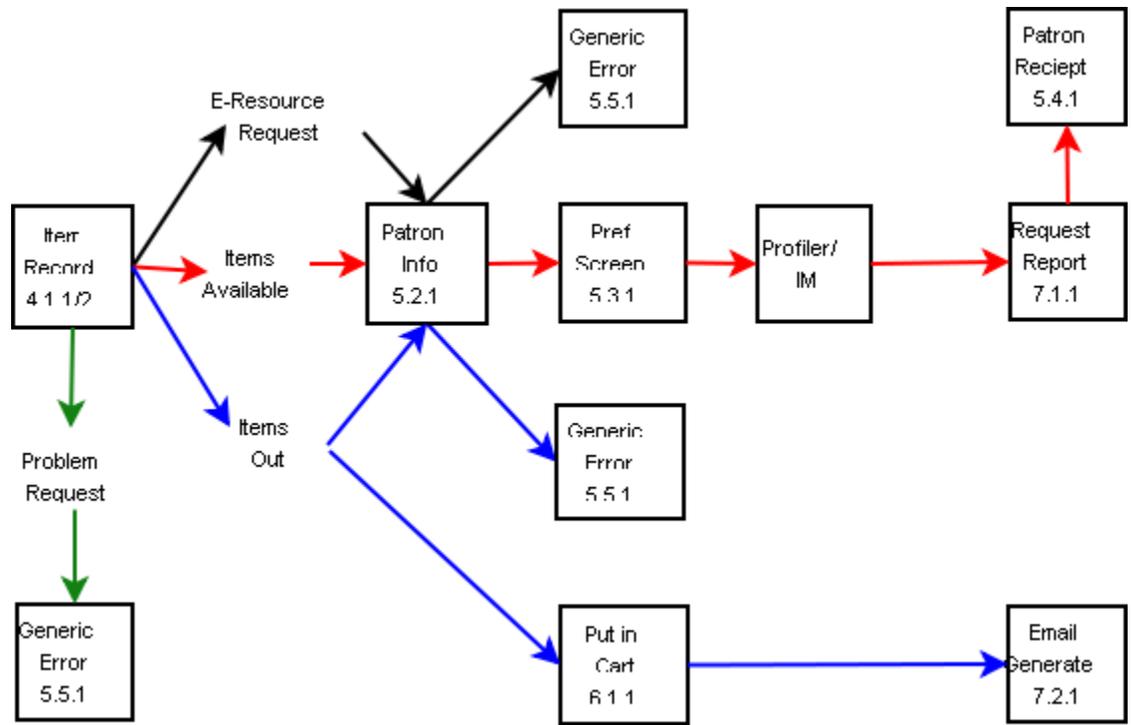
Item(s) - 0

**There are no items attached to this record. (etc...)**

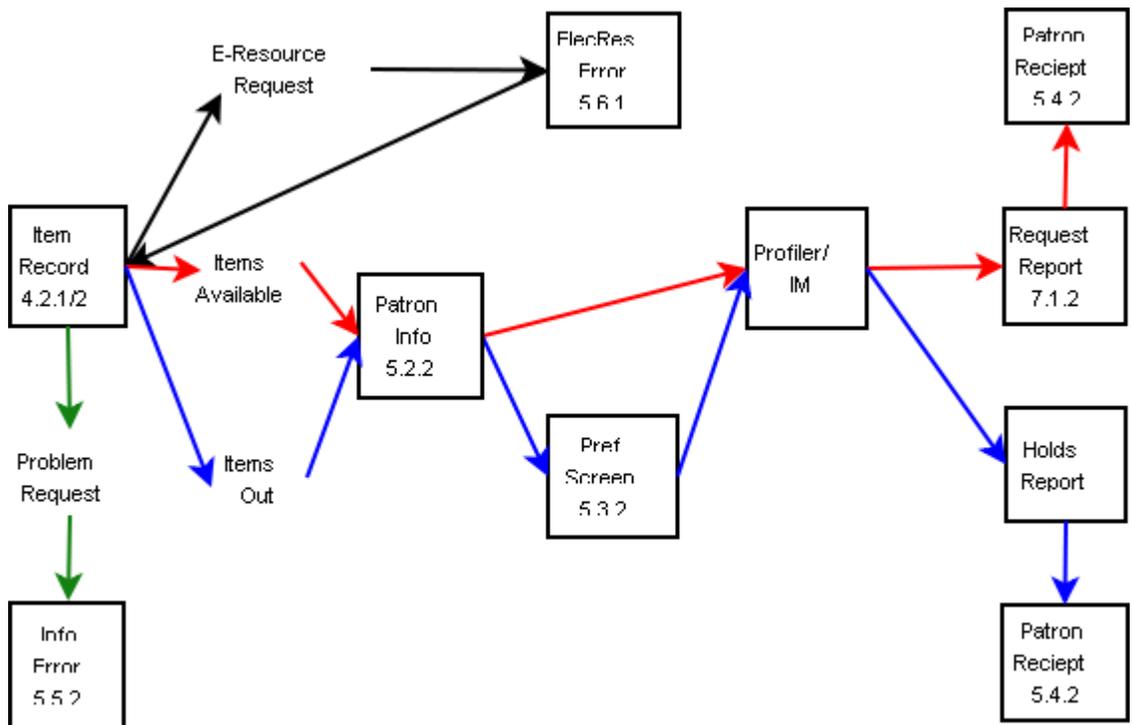
## 5. Request Function

- 5.1.** In order to get a broad sense of what we are trying to achieve in the following pages, we've included a rough diagram of the flow of information as we see it, which should give you a sense of what it is we are trying to solve in the problem of our requests. Some problems with requests include:
- a.** We are a low residency school and fulfill requests and holds in exactly the same way (by mailing them to the student) so we have a unique task in streamlining the process so that it is seamless to students and efficient for us.
  - b.** There are too many dead ends where requests are unsuccessful and they all receive the same generic error message that doesn't provide feedback to the student.
  - c.** Some screens are unnecessary to the request at hand and often require the student to provide information that isn't needed since they cannot make that request anyway.
  - d.** Requests for items that are out do not generate any receipt for the student to reference later because we've had to create a workaround using the cart to solve the problem of placing holds vs. placing requests (which at our institution are treated the same way).

**5.5.1** *Current Flow of Requests*



**5.5.2** *Suggested Flow of Requests*



- 5.2.** The first screen of a request has a default pick-up location of “pick-up at the library.” As we are primarily a low-res program, the default should be “send to me.” Also, the user ID is a valuable identifier, but we would like to see the student’s name, program (via drop-down menu) and preferred email so that we know who we are dealing with, how best to contact them, and whether these are program relevant materials without having to look all of that information up first.

**5.2.1** Current First Request Screen

The Eliot D. Pratt Library

User ID

Pickup Location

Submit

Should be the default

The Eliot D. Pratt Library | Home | Comments | Privacy | TOP

**5.2.2** Alternate First Request Screen Example

The Eliot D. Pratt Library

User ID

Full Name

Program

Pickup Location

Preferred Email

Submit

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- 5.3.** Currently, students see the second “preferences” request screen for items that are in and they get an error message when items are out. This is because we have disabled holds, as they have proven problematic for us in

the past with our semester long due dates. If we were to re-enable holds, this screen would become meaningful. Of course, it is only meaningful for items that are out. Students shouldn't see this if all of the items they are requesting are available to them. So, if items are available, this screen should not appear. If all or some of the items are out, then show the preferences screen. Our alternate screen shows roughly what we are looking for, and the language is not definitive.

### 5.3.1 Current Second Request Screen

## The Eliot D. Pratt Library

Currently, no preferences listed

Please specify your preference below, if the item is not available at the Eliot D. Pratt Library.

Submit

Reset

Cancel

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### 5.3.2 Alternate Second Request Screen – Items Available

## The Eliot D. Pratt Library

**Some of the items you requested are currently checked out**

**Would you like us to:**

- Get them from another library through Interlibrary Loan.
- Contact you for help in finding other materials.
- Cancel this request for now.

Submit

The Eliot D. Pratt Library | [Home](#) | [Comments](#) | [Privacy](#) | [TOP](#)

**5.4** Once the preferences screen is fixed, the receipt will display the student's preferences for them to reference later. Normally, if a request is made for a single item and that request is canceled, the student gets a quick confirmation of that action. In this case, we would like any canceled request not to go through to us, but for that decision to be noted here on the receipt for their reference. We have deleted some of the information on this receipt and added the information we requested they provide so that it serves as an accurate reflection of their request. We have also made some minor language changes, such as using "request" instead of "page" for consistency's sake. Language changes are indicative of what we would like to change, but are not the definitive changes we would like to see yet.

**5.4.1** Current Request Receipt

Your **page** has been successfully processed.

**Note Changes in Red**

<b>Transaction Number</b>	2361
<b>Placed Location</b>	Goddard College
<b>Pickup Location</b>	Pickup at the Library
<b>Placed Date</b>	3-31-2008 16:37
<b>Expiration Date</b>	10-1-2008 09:00
<b>Requestor</b>	Linda, Helen
<b>Address</b>	local local local local
<b>Patron Type</b>	Local Employees
<b>Call Number</b>	QL 795 .C2 V3 1968
<b>Author</b>	Van Vechten, Carl, 1880-1964.
<b>MISSING: 'RequestRootTitleLabel'</b>	The tiger in the house / [by] Carl Van Vechten ; with
<b>Title</b>	The tiger in the house / [by] Carl Van Vechten ; with
<b>Part Title</b>	
<b>Series Title</b>	
<b>Publication Info</b>	New York : A. A. Knopf, 1968, 1936.
<b>Item Barcode</b>	34633000258218

Please specify your preference below, if the item is i

**Page Request Questions**

I would like help finding other materials (a librarian wi  
 I would like to request this item through Interlibrary L  
 Cancel this request  
 Comments

<b>Bib Id</b>	21049
<b>Shelf Location</b>	Circulating
<b>Copy Number</b>	1
<b>Item Class</b>	Circulating

OK Cancel

**5.4.2 Alternate Request User Output Screen Example**

Your request has been successfully submitted.

<b>Transaction Number</b>	2361
<b>Placed Location</b>	Goddard College
<b>Pickup Location</b>	Pickup at the Library
<b>Placed Date</b>	3-31-2008 16:37
<b>Expiration Date</b>	10-1-2008 09:00
<b>Requestor</b>	Linda, Helen
<b>Program</b>	MFA - Creative Writing
<b>Preferred Email</b>	helen.linda@goddard.edu

**Preferences for items that are checked out** - Get them from another library through Interlibrary Loan.

1

<b>Call Number</b>	QL 795 .C2 V3 1968
<b>Author</b>	Van Vechten, Carl, 1880-1964.
<b>Title</b>	The tiger in the house / [by] Carl Van Vechten ; with a new in
<b>Part/Volume</b>	v. 6
<b>Publication Info</b>	New York : A. A. Knopf, 1968, 1936.
<b>Item Barcode</b>	34633000258218
<b>Location</b>	Due: 8/14/2008

2

<b>Call Number</b>	QL 795 .C2 V3 1968
<b>Author</b>	Van Vechten, Carl, 1880-1964.
<b>Title</b>	The tiger in the house / [by] Carl Van Vechten ; with a new int
<b>Part/Volume</b>	v. 7
<b>Publication Info</b>	New York : A. A. Knopf, 1968, 1936.
<b>Item Barcode</b>	34633000258218
<b>Location</b>	Circulating

OK

Cancel

- 5.5** A different second screen is shown when a request cannot be made. Currently, requests cannot be made for Goddard materials that are out. They can still hit the request button and choose from the options on the first screen, then they receive this message, which does not provide them with any valuable feedback. The changes in 5.3 enabling holds should solve this problem, but there will still occasionally be request errors that we will need to sort out. We would like any error screen, regardless of the circumstances, to provide useful feedback to the patron. Please keep in mind that the language here is an example of tone and not necessarily the exactly language we want to use.

**5.5.1** *Current Failed Request Screen:*

## The Eliot D. Pratt Library

Your request was not processed. Please contact a librarian.

Diagnostics: 4085

Diagnostics: 4036

OK

---

**5.5.2** *Alternate Screen Example:*

## The Eliot D. Pratt Library

We're sorry, but we are having difficulty processing this request. Please contact a librarian for help getting your materials.

Email: [lits@goddard.edu](mailto:lits@goddard.edu)

Phone: (802) 906-8312 x 208

Diagnostics: 4085

Diagnostics: 4036

OK

- 5.6** Though we touch on this in 3.3, we are also finding that screen 5.4.1 shows up for electronic resources, which cannot be requested at all but still have a request button in their records. **Is this something they are able to fix now?** We would like the request buttons on e-resources removed altogether, but in the meantime would like to see a message directing the student back to the item record.

**5.6.1** *Example of Electronic Resources Request Message*

## The Eliot D. Pratt Library

**The item you are trying to request is an electronic book. It is available to you online.**

**Please return to the item and click on the link for Electronic Location & Access.**

Diagnostics: 4085

Diagnostics: 4036

[Return to Record](#)

---

## 6. Changes to the Cart:

**6.1.** We have found that layout of the cart is a bit confusing for the following reasons:

- a.** The sort menu is floating there with the cart management options, but isn't labeled. We also find that this sorting option is unnecessary if there is more information provided in the brief record. This assumes that the patron has seen enough of the record to decide to place it in the cart. If they want to see a full record again, we suggest a clickable title that will allow them to go back to it. The cart information really needs to be restricted to author/title and location/availability information.
- b.** We like the ability to check certain items, but find that the check box could be used for more than just removal, helping students manage their cart in other ways, simplifying the functions at the top.
- c.** Individual request buttons should be removed in favor of the larger check option. This leaves a single "way" to manage the cart and eliminates any confusion about how to make a request.
- d.** *I think I went crazy with the buttons...unnecessary?*
- e.** If the changes are made to the request function from the item records, then we would not need the note at the top of the screen as it would no longer be an option to email the librarian a list of requests. When students make requests from the cart, they often do not provide any identifying information, so we have to spend a lot of time tracking them down. The uniform request function in section 5 would achieve the same outputs regardless of how they make the request and there is consistency for the patron. This leaves the email function simply for email and doesn't confuse it with requests.

**6.1.1** Current Cart Screen**Cart** ?

To request this item from off-campus, select Full View from drop-down box below, click the Email button, and then email to **libraryrequ** on campus, check the stacks. Let us know if you need assistance. **D**

The Cart is currently holding 1 record.

- Refresh Cart
- Delete Selected Records
- Clear Cart
- Save or Print Cart **B**
- E-mail

 **A****Request** **C**

**Author** Hooks, Bell.  
**Title** Teaching to transgress : education as the practice of freedom /  
**Call Number** LC196 .H66 1994  
**Publisher** New York : Routledge, 1994.

 Check to select this record for deletion. **B**

**6.1.2** *Alternate Cart Screen Example***Cart** ?

The Cart is currently holding 1 record.

- Request ALL items in the cart.
- Request SELECTED items in the cart.
- Save or Print the cart.
- Email the cart.
- Delete SELECTED items from the cart.
- Clear the cart.

---

Check to select this record

<b>Author</b>	Hooks, Bell.
<b>Title</b>	<a href="#">Teaching to transgress : education as the practice of freedom /</a>
<b>Call Number</b>	LC196 .H66 1994
<b>Publisher</b>	New York : Routledge, 1994.
<b>Status</b>	Available
<b>Location</b>	Pratt Stacks

---

## 7. Outputs to Librarians

**7.1.** In order to understand why these requests need to be fuller and uniform, we've dedicated this section to the outputs that show up on the librarian side, either as an email or a report. Below is a screen shot of an "unfulfilled requests" report that we use to identify new requests each day.

- a.** Adding the fuller information in section 5 saves us steps in figuring out a student's identity at this stage.
- b.** We need to be able to see how many copies are available. The status would be helpful, but the number of copies/volumes is vital.
- c.** Students should be allowed to make item *or* bib level requests, not both. They produce different information and having two methods makes it harder for us to trust that the student is selecting what they actually want. This way, we can teach them how to do it *one way*. We are throwing in with item level requests only to simplify the issue of requesting from multi-volume sets.

### 7.1.1 Current Unfulfilled Requests Report Screen

Report: Unsatisfied Requests  
Configuration Name: daily requests  
Configuration Author: Clara

Eliot D. Pratt Library  
Goddard College  
Plainfield, VT

Record(s) Found: 5

Call Number: E 83.866 .M36  
Marshall, S. L. A. (Samuel Lyman Atwood), 1900-1977. *Crimsoned prairie; the wars between the United States and  
author; maps by Mark Lennox.*  
Request Type: Page

Item Status: Available - Circulating (E 83.866 .M36),

Owning Location / Shelf Location: /

Pickup Location: Send to me

Patron Barcode: 24633000309901

Patron Name: Linda, Helen

B

A

**7.1.2. Alternate Unfulfilled Requests Report**

Report: Unsatisfied Requests  
Configuration Name: daily requests  
Configuration Author: Clara

Eliot D. Pratt Library  
Goddard College  
Plainfield, VT

Record(s) Found: 5

Call Number: E 83.866 .M36  
Marshall, S. L. A. (Samuel Lyman Atwood), 1900-1977. *Crimsoned prairie; the wars between the United States and  
author; maps by Mark Lennox.*  
Copies/Volumes: 2  
Item Status: Available - Due 4/5/08 , Due: 6/27/08  
Copy/Volume Requested: v.1  
Preference: ILL  
Patron Barcode: 24633000309901  
Patron Name: Linda, Helen  
Pickup Location: Send to me  
Patron Academic Program: MFA-WV  
Patron Preferred Email: celestihel@gmail.com

**7.2** Our workaround to the disabled holds is to have students email their requests from the cart. However, because none of the student information is required strictly

by the system, we are often left with little to no information about the requesting student. This means we have to track this person down, which can take days. We do not want to remove the email function, as it is valuable in other ways, but as a requesting tool it is wrong for the job. Below is a screen shot of a request where the patron has offered no personal information in the email form and it came from celestihel@gmail.com, which in no way identifies the requester. There is no alternate shot because we'd like not to have this for requests any further. The below screen shot is simply to illustrate why this method is not working for us.

### ***7.2.1 Current Email Request From Cart***

Your Session ID Number: 2007120413254210233  
Created: Tue Dec 4 13:38:57 2007

|----- Records Below -----|  
Author: Atwood, Margaret Eleanor, 1939-  
Title: The animals in that country  
Call Number: PR 9199.3 .A8 A83  
Publisher: Boston, Little, Brown [1969, c1968]  
|----- Record Break -----|

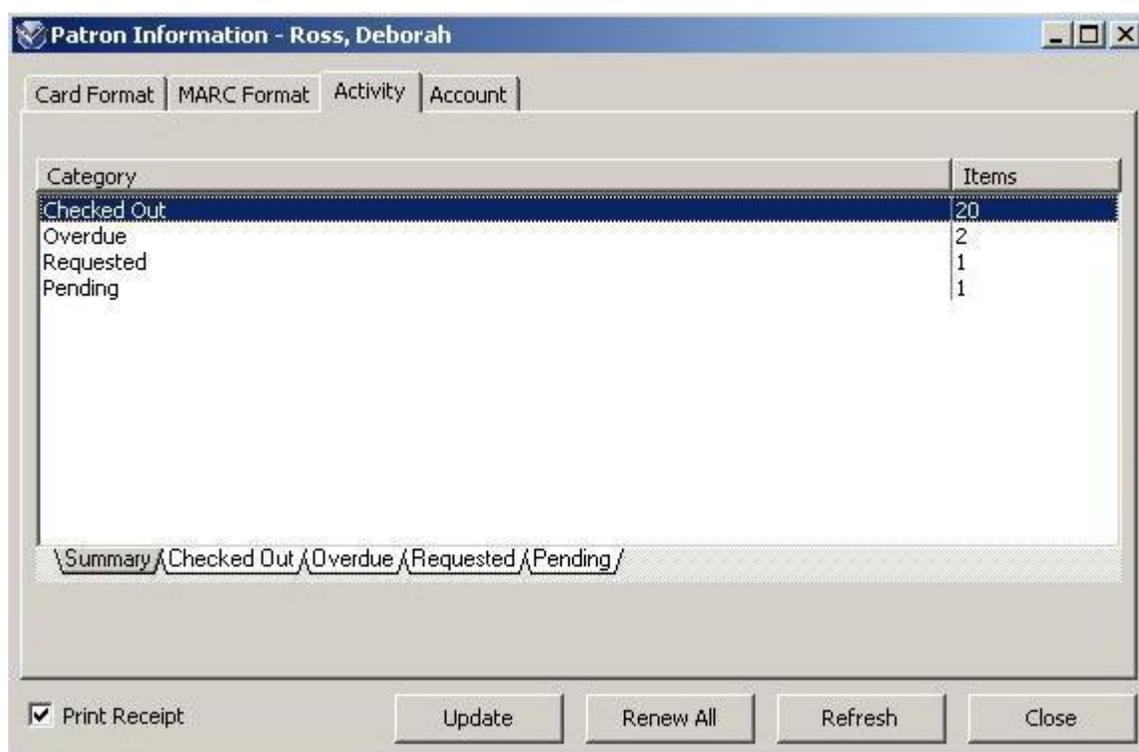
Author: Atwood, Margaret Eleanor, 1939-  
Title: The edible woman /  
Call Number: PR 9199.3 .A8 E3  
Publisher: New York : Popular Library, 1976, c1969.  
|----- Record Break -----|

Author: Atwood, Margaret Eleanor, 1939-  
Title: The journals of Susanna Moodie;  
Call Number: PR 9199.3 .A8 J6  
Publisher: Toronto, Oxford University Press, 1970.  
|----- Record Break -----|

## 8. iPortal Indication of Request & Circulation Warning of Requested Item

**8.1.** Below is a shot of a patron's record where the item listed as "requested" is not showing up on any of our reports. The reason is that this patron requested the item in question online. Sometime later, a different patron on location checked the item out. There was no indication to us that it was being held for someone else, and no indication to the patron who checked it out that it was not available in iPortal. We check the Unfulfilled Requests Report every morning, but if an item that has been requested is checked out by someone else before we run it, the item will never show up on our Request Report and we will have no idea that the student requested it until they complain. We would like for items that have been requested to show as unavailable in iPortal and to issue a warning to the circulation desk that the item is being held if someone tries to check it out.

### 8.1.1. Patron Activity Record



Category	Items
Checked Out	20
Overdue	2
Requested	1
Pending	1

\Summary / Checked Out / Overdue / Requested / Pending /

Print Receipt    Update    Renew All    Refresh    Close

## 9. Conclusion

9.1. Necessary?

Here is the priority list of things we'd like to see changed about the iPortal. I will have included page numbers in parentheses referring back to the original document we discussed at the VUG training where applicable. Of course, please feel free to contact me for any other clarification.

**A.) Requests & Views** – all elements of this system need to be addressed as soon as possible. In the following order.

1. Request Preferences Screen (p. 24) – What needs to happen here is for this screen to have options and to provide those options when a patron is requesting an item that is out. Currently, there are no options and the screen shows up for items that are available for page. In testing requests for items that are checked out, this screen does not show up at all. The options in the alternate image are not exactly what we are looking for, and I am working with someone to come up with exact wording, but it should be enough to demonstrate what we're going for. When the time comes that you all have sorted out your end, I should be able to produce the exact language. Keep me posted.
2. Remove Bib Level Requests – we need the option to request at the Bibliographic Level removed. To the bibliographic card, we'd like to add a note that indicates to students that they need to go to the item level to make a request and that if the item is an e-book, they need to click on the link to ebrary or netlibrary.
3. Excessive Requests/Unsatisfied Requests Reports – I've been working on this with Michaela. On our end we're continuing to test these reports to get the right mix. We will not be able to do a full test until the previous issues are resolved so that we can see how the whole process is going to work, start to finish.
4. Failed Request Screen (p. 27) – We need friendlier information displayed here and also for the diagnostic codes to be contextual so that the user can tell us what it told them, which they never seem to do with codes.
5. Initial Request Screen (p. 23) – we need the default location to be “send to me”.
6. Email to me button (p.25) – This is something that has come up since the meeting, but we'd like to clarify the buttons at the bottom of the receipt. Instead of “OK” we'd like it to say something like “I'm finished” and instead of “Cancel” we'd like “Cancel Request”. We also want to know if it is possible to add another button that would allow students to email this receipt to themselves?
7. Save to Cart Button (p. 17) – Patrons rarely remember to check the “Add to cart” checkbox and click the “Save to cart button. Tony indicated that he could make checking the box automatically put the item in the cart. Whatever way this has to happen, we'd like this to be a one click operation.

**B.) Search & Results**

1. Drop-downs (p. 7a) – there are a few issues here. First, we need to eliminate a large percentage of these options altogether so that our students can see the forest for the trees. I need to know what the possibilities are for eliminating and/or renaming options.

2. Electronic Resources search (p. 7b) - We need to figure out which of the filters is referencing the 006 Type M and/or the 008 Form S so that we can rename that filter “electronic resources” and eliminate the special keyword search for electronic resources.
  3. Goddard Authors search – we would like to be able to have a filter for Goddard authors that draws on the 610 for Goddard College. Can this be done? If not as a contents filter, then perhaps as another kind of pre-fab quick search like the one discussed below at point 5.
  4. Quick search (p. 7d) – please move this to the top of the page, above the Keyword Search boxes.
  5. Date added link – Becky and I have been discussing a way to add a pre-fab search for date items are added to the system as a “search for items recently added to the library” search. We’d like this somewhere near the quick search or to discuss further some other options for placement.
  6. Default Sort (p. 9a) – We would like the default here to be set at publication date (author) in descending order.
  7. SDI (p. 9g) – please remove this button altogether.
  8. Return to previous (p. 9h) – please move this below “List of Titles” header but above “Save all to cart”
  9. Whitespace (p. 7c) – there’s too much of it and we need to synch it up...we can discuss this further when we get there.
- C.) Opening screen/Front Page**
1. Log in expiration – currently our login expiration is set at 5 min. We’d like it reset to 20 min. and for there to be a custom target page that pops up when the session is expired that says “Your session has expired. Please log back in to reconnect to your account.”
  2. Login message (p.3) – we need the message asking people to log in to be bigger/bolder/ etc. that indicates to students that they need to log in to make requests or view their account.
  3. Logout link (p. 4) – We need the top right link that says “Log in” to say “Log out” if they are already logged in, otherwise it’s confusing.
- D.) Overall look and feel –** We would like to change the color scheme to match the rest of the Goddard website and include the Goddard logo in the banner somewhere so that students always know where they are. We have not yet looked at the other colleges’ iPortals to cull ideas, but we’ll address those cosmetic issues once the rest of this has been addressed.