

Appendix B: Methods and estimate of effort for common and configurable components

Common Components	<p>Components that should will be common to each interface. Each entry includes the proposed method, an estimate of effort, and notes about the component.</p> <p>Low effort = less than 1 day per institution Medium effort = 2 days to 2 weeks per institution High effort = collaborative development that needs requirements definition, iterative testing, and/or librarian/user feedback.</p>			
Results List				
	Method	Effort	Current status	Notes
Create a common set of properties for record display on result list		Low		
Normalize display of vernacular author/pub data		Low		
Normalize paging and sorting controls		Low		
Investigate the use of COinS vs. UNAPI for support of Zotero and LibX - normalize implementation		Medium		
Normalize search bar index choices		Low?		Need to include call number browse integration

Common breadcrumb functionality		Low	Search TRLN, NCCU, and UNC use the same methods here.	
Request button on result list		Low, see note		Depends on how much filtering we need to do to block requests for certain item types
GBS/OCA links on result list - Google Preview opens in Javascript lightbox		Low	NCSU has implemented lightbox feature	Need to add OCA API and Google preview support
Javascript-less query handling		probably low		Based on implementation at UNC
Full Record				
	Method	Effort	Current status	Notes
Create a common set of fields for display above tabs		Low		
Create a common set of export options		Low		
Google Preview opens in Javascript lightbox		Low	Currently implemented at NCSU	
Investigate the use of COinS vs. UNAPI for Zotero and LibX integration - normalize implementation		Medium - related to effort on results list		

Common search bar functionality		Low - related to effort on results list		
Common link to return to search / page through results		Low	Search TRLN and NCCU have a return to search feature	Return to search is present, need paging. Can use UNC's methods.
Create a common set of shopping cart actions		Low		
Configurable Components	<p>Components that should be configurable per institution. Each entry includes the proposed method, an estimate of effort, and notes about the component.</p> <p>Low effort = less than 1 day per institution</p> <p>Medium effort = 2 days to 2 weeks per institution</p> <p>High effort = collaborative development that needs requirements definition, iterative testing, and/or librarian/user feedback.</p>			
Branding	<i>Aspects of the interfaces that affect local branding and 'look and feel'</i>			
	Method	Estimate of effort	Current status	Note
Header	Include files, XML configurable	Low	Complete for NCCU and Search TRLN	Institutional design effort is unknown
Footer	Include files	Low	Complete for NCCU and Search TRLN	
Local styling throughout the local catalogs	Include files, localized css and jsp, local image files	High		

Basic Search	<i>Describes features of the basic search tab on the opening screen of each user interface</i>			
	Method	Estimate of effort	Current status	Note
Allow customization of basic search page content (welcome, FAQ, help, etc)	Include files; options driven by xml configuration file	Low for Search TRLN, Medium effort for each institution	Include files used for NCCU and Search TRLN	
Advanced Search				
	<i>Describes features of the advanced search tab</i>			
	Method	Estimate of effort	Current status	Note
Institution specific limit options on advanced search	XML Configurable	Low+	Hardcoded in NCCU and Search TRLN	Adapt UNC xml configuration file to control the advanced search options
Institution specific filtered browse urls	Parameter driven	Low	Parameter driven for NCCU and Search TRLN	Use XML configuration file as above to control limiting for browse new title and browse call numbers
Result List				
	<i>Features of the results list not including the handling of facets</i>			
	Method	Estimate of effort	Current status	Note
Real-time status display--custom setting required for each institution	Institution specific java classes	Medium to High		Methods currently used in the local skins would need to be ported to the shared code
Enable local settings for chat / email a librarian button	XML configurable	Low	Currently hardcoded in Search TRLN and NCCU Catalog	

Optional related subject suggestions	XML configurable (on or off)	Low	Currently this feature is enabled for both Search TRLN and the NCCU Catalog	
Optional World Cat Identities Author suggestions	XML configurable (on or off)	Low	Currently this feature is enabled for both Search TRLN and the NCCU Catalog	
Customizable links to external catalogs (Worldcat/Worldcat Local, Search TRLN, Summon)	XML configurable (on or off for each option), style with local css	Low to place code in application, local styling efforts Medium		
Optional ability to filter by institution or expand to TRLN (this might end up on the common feature list)	XML configurable (on or off); parameter driven	Low	Parameter driven in Search TRLN and NCCU	
Results - Facet options				
<i>Options regarding the display of facets on the results list. Medium effort estimate is based on completing the work for all of the facet customization options including the merging of NCSU's XML driven facet configuration tool and UNC's Boolean faceting implementation</i>				
	Method	Estimate of effort	Current status	Note
Control which facets are open by default	XML configurable	Medium	Configurable in NCSU configuration file	
Exclude certain facets from appearing	XML configurable	Medium	Configurable in NCSU configuration file	
Apply local facet labels	XML configurable	Medium	Configurable in NCSU configuration file	
Apply local facet ordering preference	XML configurable	Medium	Configurable in NCSU configuration file	

Optional JS actions to expand/contract facets	XML configurable	Medium	Configurable in NCSU configuration file	Need to show all refinements to support this feature
Boolean facet limiting	XML configurable to select which facets are eligible for Boolean faceting and exclusion	Medium		Boolean faceting will be a common feature in all UIs. Institutions will be able to determine which facets are eligible for this feature.
For each facet, specify dynamic vs. alphabetic sorting of expanded facet values	XML Configurable	Medium	Configurable in NCSU configuration file	
Allow insertion of custom content, such as NCSU's "refine your search"	XML Configurable	Medium		Built into facetbean java
Results – Record display options				
	Method	Estimate of effort	Current status	Note
Ability to truncate titles over 70 characters in length	XML configurable (on / off)	Low		
Real-time status display--custom setting required for each institution	Institution-specific java classes are required	Medium to High	Supported in the local skins	Methods currently used in the local skins would need to be ported to the shared code

Full Record	<i>Describes features on the full record screen.</i>			
	Method	Estimate of effort	Current status	Note
Provide institutions ability to choose whether subjects display above the tabs or on the subjects tab	Separate include file needed for NCSU	Medium		
Localize reworks and request urls	XML Configurable	Low		
Full Record Tabs				
	Method	Estimate of effort	Current status	Note
Allow institutions to choose which tabs to display	XML Configurable (on/off)	Low		
Make tab labels configurable	XML Configurable			
Location tab will be unique for each institution to account for differences in holdings displays	Institution specific java classes for live-holdings; perhaps use separate include files	high		
Ability to configure which data appear on the details tab	XML Configurable (see notes)	Low	Configurable in NCSU config file	NCSU configuration file determines which fields display, major heading group, which label to use, whether a label shows up . would need to add handling for bookplates and classic catalog link

Optional display of MARC tab	XML Configurable (on/off); separate include files for each institution	Low, but each institution would have to do it. Medium effort to figure out how to pull MARC data from each institution		Possibly eliminate or reduce to a link that allows users to link to marc view in legacy system.
Link to ContentDM for Digital Content	XML Configurable (on/off); javascript	Low		UNC has implemented, will use UNC javascript
Digital bookplate links in "details"	Optional local javascript	Low		
Full Record Tabs: EAD				
EAD display	<i>All institutions will use the same code to retrieve EAD xml content from the TRLN server, we'll customize display using local css and javascript; see below for more detail. Estimate of effort for completing all EAD work is high.</i>			
	Method	Estimate of effort	Current status	Note
EAD tab content	Local css and javascript	High		All tabs will be the same across all skins except for the inventory tab, which will be unique for each institution
Support for custom tab labels for EAD content		High		Addressed by configuration option above
Search term highlighting in EAD content	XML Configuration (on/off); optional local javascript/css	High		
Other				
Optional search term highlighting	XML Configuration (on/off); optional local javascript/css	Low		

Develop request feature that will display on results list and full record page	XML configuration (on/off) for results list and full record; institution specific .jsp, possibly separate java classes depending on relationship to 'Request mask'	High	This is in place on Search TRLN in the Shopping Cart	Will need to put together a requirements document
'Request mask': Request button shows up only on requestable items	XML configurable or custom java classes per institution	High		This could also be implemented as a custom Java class or tag library at each institution if the logic is too complicated for XML.
Google analytics support	XML configurable (on/off) and to track institutional keys	Low		
Virtual Browse	XML Configurable (on/off)	Medium	Currently parameter driven in Search TRLN and NCCU Catalog	
Search tabs (Search, Advanced Search, Browse New Titles, Browse Call Numbers) to appear at the top of each page	XML Configuration (on/off)	Low		Local customization through CSS possible; incorporate into searchbar.jsp