

# Future of Evergreen Strategizing Session

## Evergreen Conference 2019

**Goal:** Build upon last year's prioritized topics

**Introductory Slides:**

[https://docs.google.com/presentation/d/1hqKWWx8f6\\_rY7isNd1FdBmlmqBDg1z1N9fmM\\_s7u7VQ/edit?usp=sharing](https://docs.google.com/presentation/d/1hqKWWx8f6_rY7isNd1FdBmlmqBDg1z1N9fmM_s7u7VQ/edit?usp=sharing)

*\*Red lines below were marked as priorities*

### Category 1: OPAC

**Q: What are the critical problems now and how do we fix them?**

- **From 2018 notes: Usability / aesthetics**
- **From 2018 notes: OPAC configuration dashboard**
- **Accessibility**
- From 2018 notes: Authority records integration in keyword search
- From 2018 notes: Digital content integration (overdrive, ebsco)
- From 2018 notes: Social media integration
- Improve relevance - short records take precedence over longer records
- Gather user experience feedback from end users for improving interface

**Q: Where do you see the OPAC in 3 years and how do we get there?**

- Patron submit acquisitions requests through the OPAC that go directly to acquisitions
- Better management of patron's lists, circ history, etc. including downloading batches of records by date range, integration with Good Reads, etc. Option to save only books (or whatever) to circ history.
- Completely accessible OPAC design
- Take a look at Pioneer Library Systems OPAC - owwl.org

### Category 2: Acquisitions

**Q: What are the critical problems now and how do we fix them?**

- **Less confusing end of fiscal year**
- From 2018 notes: Angularization of Acquisitions interface
- Better communication / linkage between line items & bibs
- Better management of vendors - including notes
- Expose more database info in client (more data is stored than we can access)
- Better management of vendor credits
- Better status/management for received / returned items
- More fund complexity
- Improve terminology - confusing and repetitive

**Q: Where do you see Acquisitions in 3 years and how do we get there?**

- No more clunky interface
- Easy searching of invoices, vendors, etc.
- Something that will appeal to libraries not using Evergreen yet so we can reach others who might become customers
- Something that will appeal to libraries that are on Evergreen but not using Acquisitions

## **Category 3: Cataloging**

**Q: What are the critical problems now and how do we fix them?**

- **From 2018: Authority Improvements**
- **More complete dropdown help boxes in 008**
- From 2018: ERM (Electronic Resource Management)
- Simpler form for adding MARC records - show field name as well as (or instead of) MARC tags
- Ability to batch edit fixed fields in MARC Batch Edit
- CWG sessions to demo / discuss specific functionality & workflow

**Q: Where do you see cataloging in 3 years and how do we get there?**

- Easier printing set-up, especially for spine & pocket labels
- More integration of RDA Elements
- Documentation integrated into staff client
- Mouse-over menus
- Improvement w/templates when adding items

## **Category 4: Reports**

**Q: What are the critical problems now and how do we fix them?**

- **From 2018: Ability to share templates (import/export?)**
- **From 2018: User-friendliness**
- **From 2018: Dashboards for basic stats**
- **Allow report templates to be edited without having to create a new version every time**
- **Improve MARC data retrieval/parsing**
  - Can't run reports to pull multiple MARC fields from bib records (which we used to do all the time in our previous system)
- Search by folder dropdown doesn't show full tree
- Sorting of report templates
- Easier way to change or identify joins from inner to outer
- Terms are inconsistent from one place to another
- Improve documentation / manual

**Q: Where do you see the reports module in 3 years and how do we get there?**

- Angularize Reporting
- Quick Stats Dashboard

**Category 5: Other**

- **Accessibility**
- **Patron Buckets**
  - Get list of expired patrons so you can see who has outstanding fines, how long they've been expired, etc.
    - And delete them
    - And how does that affect stats?
  - People leave - how does this get communicated back to the consortium?
  - Place a hold for everyone in the bucket
    - Randomize the hold order so that it is fair?
    - Equinox is working on this with Ohionet/COOL
- Course Reserves
- Receiving credit card payments at the desk through Evergreen from the staff side (and make it work like the OPAC)
- Way to let people know about new materials of interest
- Videos to show off new features to patrons
- Security - better security for user accounts, follow best practices for patrons (reset your password every so often)
- Receipt templates - share settings so you don't have to start from scratch - people can share easily when they figure out a new printer