

**Final Report from the
Evergreen ILS Task Forces
July 21, 2011**

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Evergreen ILS Task Forces Summary Overview

The task forces, as charged, evaluated the functionality and usability of the individual Evergreen “modules” and have prioritized gaps in functionality by answering these questions:

- How well does the Evergreen software fit patron and staff needs?
- How easy are the patron and staff interfaces to use?

All of the members of all task forces agree that the current Evergreen ILS has many significant functional gaps which preclude migrating to the product within the time frame set by the eiNetwork Board. All gaps identified as priority one need to be developed, tested and implemented. After extensive testing, it is also our conclusion that Evergreen currently fails to meet some of the guiding principles identified by the eiNetwork Board in the Guidelines for Evergreen ILS Taskforces document of February 2011. Specifically,

- Supporting the Evergreen development community, and leading the development process will not directly support the long term success of libraries in Allegheny County. It may actually impede daily operations to a significant extent in the short term. King County reports only 20% productivity in their tech services department.
- We do not believe that the move in 15 to 18 months is feasible. King County development time lines indicate a much longer period for development of required functionality.
- Evergreen OPAC performance is not acceptable.
- Evergreen does not empower our patrons. Basic functionality in the current system, telephone notification, hold placement, email reliability and reading history, is not available in Evergreen.

The ILS system is the foundation of our infrastructure. Its stability, usability, security and efficiencies are extremely critical to ongoing daily operations as well as our long term success. It must, at the very least, provide all current functionality, and ideally be a known quantity, one we understand and trust.

We have all experienced significant changes in our libraries in the past few years. Our concerns about Evergreen are not driven by a fear of change, but rather from our commitment to public service, our experience in library management, and our intent to honestly convey the implications and challenges the missing Evergreen functionality will impose on both library staff and patrons.

Thank you for this opportunity to learn and understand more about Open Source in general and Evergreen in particular. We hope that eiNetwork and library staff will keep abreast of all Open Source development, that eiNetwork will continue to work as a development partner with King County, and that we will revisit this issue in the future.

Respectfully submitted,

Christy Fusco, Maria Joseph, Tina LaMark, Sharon McRae, Helen Palascak

Evergreen Patron Interface Taskforce [ePIT]

July 21, 2011

Included in the ePIT Final Report:

- Prioritized functionality OPAC gaps as identified by the Patron Interface Taskforce
- Prioritized functionality System gaps as identified by the Patron Interface Taskforce
- Patron Catalog Survey Executive Summary

Since our interim report, members of ePIT have focused more on prioritizing the Gap List than testing the Evergreen systems and test environments available to us. When assigning priorities, level one priority was assigned to those features currently available in Millennium, as well as those considered essential for an improved catalog. We have also developed and conducted the Patron Catalog Survey, as requested by the eiNetwork Board.

In addition, we have been exploring what the “next generation” library catalog should look like and how it should work. Instead of building this “next generation” catalog in a vacuum, we have looked to some of the most popular and frequently-used Internet search engines and websites (such as Google and Amazon.com) for guidance. We worked with the eiNetwork staff researching articles to identify the features required of a new, improved catalog, including:

Relevance ranking

Stemming

Field weighting

Spell check

Refining original search

Support for popular query operators

Quoted searching & Wildcards

Proximity searching

Flexible query default processing

In line query limiters

Duplicate detection

Sort flexibility

Character sets

Faceting

Advanced search

Easily customized search result pages

Human suggestions (aka "Best Bets")

Search logging and reports

Well-rounded administrative interface

While Evergreen incorporates many of these features, in its current stage of development it is neither as advanced as Millennium, nor showing signs of becoming the “next generation” catalog. The importance of seamlessly integrating all library services into the Web by way of library catalog design cannot be underestimated.

As Karen G. Schneider states in *Part 3: The Big Picture* of her series *How OPACs Suck*, “On such sites as Amazon and Flickr, the user is not simply interacting anonymously for simple transaction functions, but as users rate, tag, collect, review, save, bookmark, e-mail, comment on, subscribe to, and share content, they are creatively engaging with the software and its content—transforming it, adding to it, improving it, participating in it. “ The next generation catalog must allow and invite this level of participation or run the risk of becoming obsolete, unappealing, or disused. The library catalog must be a “place” in cyberspace, as much as libraries are destinations in their communities. The Evergreen OPAC is a long way from offering this type of experience to its users.

In most cases, all level one OPAC priorities would need to be implemented before Evergreen offers the ease and functionality our patrons are accustomed to with the Millennium OPAC. The switch becomes even more problematic as we look ahead to our libraries' future. Changing to Evergreen would require us to go to great lengths to develop this software into a true "next generation" library catalog. It would involve both resources and time – probably more time than is allotted – in order to make this necessary development a reality.

Respectfully submitted,
Christy Fusco, Chair - Patron Interface Task Force

Work Cited:

Schneider, Karen G. “How OPACs Suck, Part 3: The Big Picture.” *ALA Tech Source*. 20 May 2006.
<<http://www.alatechsource.org/blog/2006/05/how-opacs-suck-part-3-the-big-picture.html>>

**Patron Interface Task Force [ePIT]
Patron Catalog Survey Executive Summary – July 21, 2011**

Demographic Information:

1,908 individuals completed the Patron Catalog Survey. Of those individuals:

- Approximately 50% live in the City of Pittsburgh (determined by zip codes beginning 152--). The majority of the remainder live in other parts of Allegheny County.
- Ages:
 - 8% are between 70 and 90 years old
 - 18% are between 60 and 70 years old
 - 22% are between 50 and 60 years old
 - 24.5% are between 35 and 50 years old
 - 13% are between 25 and 35 years old
 - 5% are between 18 and 25 years old
 - Less than 5% are under 18
- More than 75% were female

Using the Catalog:

- 90% access the catalog from their home computer. 20% access the catalog from a library computer, while 5% access the catalog from a smart phone or mobile device.
- A majority (37%) uses the catalog approximately once a week, 21% use it about twice a week, and 18% use the catalog nearly every day.
- The most common reason people use the catalog is to search for a specific item (97% frequently or occasionally), with placing requests coming in second (91%) and renewing third (89%). People are less likely to browse for interesting items (59%), and fewer than 10% regularly pay fines online.
- Other reasons people use The Catalog include checking due dates and monitoring library accounts and account due date. Many people indicated they were not aware fines and fees could be paid online.
- When people are searching for an item in the catalog, they usually (76%) use a title search, followed by an author search (64%). Keyword search is only used 31% of the time.
- A vast majority (89%) think it is easy to find an item in the catalog. Some reasons people disagree include:
 - “Formatting the author’s name just so is annoying.”
 - “Difficult to look just for dvds or videos”
 - “Sometimes things come up under title search that don’t come up in author search”

- “If a title or author is off in spelling the item is difficult to find...I’d like it if it brought up items that are similar in spelling like Google.”
- “E-books should be included when available.”
- 92% of respondents think it is easy to use “My Account.”
- Of the “additional features” listed in the survey, Interlibrary Loan is the most commonly used, followed by Booklists and Preferred Search. Online Help and Suggest a Purchase are used most rarely.
- Of the customizable sites listed, 77% like using Amazon. 35% like Facebook and 27% like Netflix. Other websites listed include Barnes and Nobles, Google, Goodreads, Gmail. Ease of use and quality of search appear to be the most common reasons they like those sites.
- Additional catalog features people would like to see include:
 - Personalized recommendations (64%)
 - Know about brand new items (60%)
 - Customize “My Account” space (43%)
 - Save searches and receive alerts via email or text (42%)
 - Receive library notifications via text (35%)
 - Other features listed:
 - Search for media type “paperback” (and other formats)
 - Restore ability to see place in holds queue
 - Log-in with username and password instead of library card number
 - Integration with service like goodreads.com and major social networks
 - Email newsletters for library events, new books, etc.
 - Renew account online / notification of expiring account
 - Stay logged in throughout session instead of having to log back in
 - Advance notice of new purchases
 - Automatic hold placed if you suggest a purchase
 - Integrate ebooks and databases
 - Access history of items checked out
 - Notification of other available formats

Of note: Many people also mentioned that they would not want to see any of these features due to privacy concerns, while others noted things that they do not like / have trouble with in the current iteration.

Respectfully submitted,
 Karen Brooks-Reese, Member – Patron Interface Taskforce

Acquisitions/Serials Task Force Final Report July 21, 2011

Since last reporting, this task force has continued to explore the Acquisitions and Serials Modules of Evergreen Open Source software to the best of our ability through the test environment we were provided. We met on several occasions to go over procedural findings and had a conference call with the Acquisitions Librarian at KCLS in Washington.

We have identified a multitude of gap items which are absolute show stoppers from an acquisitions point of view (see attached spreadsheets). Some of the most prominent problems we had while working in this test environment were basic command and work flow issues. What may seem like common sense features – such as standardized search commands and standard templates of various work pages – we discovered were not there and were seen as major hurdles to work flow. This opinion was verified after our conference call with KCLS, when it was reported that their work flow is at 20% of production compared to before going live with Evergreen over nine months ago.

Without getting into too much detail in this summary and repeating information that can be found in our gap list, we felt that there are several other important gaps which would keep us from being able to adequately use either of these two modules in the foreseeable future.

Acquisitions:

- Inability to place holds on order records
- Inability to conduct simple title search
- Inability to receive partial shipments
- Inability to view individual library's funds (currently all libraries' funds display)

Serials:

- Inability to create standing orders or serial orders
- Inability to claim issues

It is our finding that, at this time, Evergreen's Acquisitions and Serials modules do not have the basic functionality that we have come to expect through similar modules in Millennium. More importantly, Evergreen does not meet the standards which are necessary to perform our duties for the day-to-day operation of our libraries, nor is it able to address the growing needs of our patrons.

Respectfully submitted,
Maria Joseph, Chair – Acquisitions/Serials Task Force

Circulation Task Force Final Report, July 21, 2011

Included in the Circulation Gap Final Report:

- Notes from USM and King County conference calls.
- Prioritized functionality gaps as identified by the circulation task force.
- Prioritized “circulation requests” as identified by King County (as of 2/11)—this list of outstanding issues was sent to the task force by Karen Daniel in addition to some follow-up questions that she kindly answered. No edits have been made to her list, other than a priority number based upon what we understood.

Progress to date:

- Task force members spoke with representatives from UMS via conference call on June 28. (attached)
- Task force members spoke with a representative from King County via conference call on June 30. (see attached)
- Task force members met on July 12 to prioritize gaps in functionality as identified in the charge to the committee.
- Task force members spoke with Equinox representatives via conference call/webinar to discuss an overview of the circulation matrix on July 14.

Functionalities not explored in great depth during our work:

- a. ILL
- b. Notices/pull list
- c. Self-checkout
- d. Permissions
- e. Reports
- f. Printing spine labels and pull slip labels
- g. Items that were considered to be more policy or consortium issues

The circulation task force prioritized as a level one those functionalities that are currently available in Ill but missing in Evergreen. We struggled with many inefficiencies and lack of consistent navigation tools. Consistency of design and navigation is a huge problem in the circulation module and we prioritized it as a showstopper. It will significantly impede workflow and the ability to serve patrons efficiently and quickly. The task force discussed at length the need for extensive staff training, with part-time and weekend workers at a disadvantage. We also talked a lot about Ill and how the circulation module is patron-centric. This can't be overlooked—the ability to perform all functions from the patron record; check-in, check-out, renew, place holds, change item status, etc., is truly efficient. Evergreen is not patron-centric.

The task force felt strongly that the OPAC needs to move past Boolean searching. Many staff search Amazon while assisting a patron. Thus we prioritized a post Boolean OPAC as a one.

In addition, we prioritized a few items currently not available in III and not in Evergreen as a priority one. The clear hold shelf is one of those issues that we need to address in Evergreen and III.

Finally, we prioritized what we could wait on for 6 to 8 months as a two and a few enhancements as three.

The group discussed concerns that given the significant functionality gaps and poor navigation/design this product sets us back rather than propels us forward in service to our patrons.

Respectfully submitted,
Sharon McRae, Chair - Circulation Task Force

Summary of conversation with UMS on June 28

1. Does Evergreen have an actual Collection Agency module?
 - It's not really a "module" (nor is it with III). UMS merely extracts data. They have worked with Georgia Pines from the beginning and are currently working with 80 Evergreen libraries.
 - Currently the UMS interface pulls from the pnumber in Millennium. Evergreen does not carry a permanent pnumber. Is there any other internal ID number? Our rep indicated other options to pull from include: checkout location, barcode, profile. How would these work? (Especially with some in the consortium participating and others not?) What happens when staff replaces barcodes? Does the link to UMS remain?
 - They work from the patron barcode—all of them listed in the record if that's how we want to set it up. UMS indicated it is much easier as a third party vendor to extract data from the Evergreen environment than III because it is open source.
 - Can individual libraries still set their own criteria for submissions (one billed item, balance over \$50) and can they vary by library? Yes
 - Is the Home Library still the field triggering which library is submitting? Not currently—it's the library where the items are checked out. But only those libraries that participate in UMS.
 - How does the \$10 fee appear in Evergreen? Is it a "Grocery" (manual) Charge? Grocery.
 - Does the auto-submit work the same way? Can libraries that choose to manually submit still do so? No
 - Is the NCOA yearly update available? Can we run batch reports for zip code areas to populate the Home Library field? What about the boro field? Yes.

UMS noted that migration to Evergreen from III can be tricky because billed items migrate into the grocery bill—thus if a patron returns an item in the book drop, it isn't automatically checked in from the account, which leaves the account in collection. UMS noted that migration from III to Evergreen can lead to a giant surprise in fines since Evergreen computes fines on a daily basis even if items are still checked out.

Summary of holds conversation with King County—June 30

- King County is a consolidated system that circulates 22 million items a year. They deliver 6 days a week and at any given time 25% of collection is on hold. Centralized shipping.
- They utilize the FIFO process, no soft/hard/stalling.
- “Reshelving” is a separate status. The length of time can be set at the local level.
- Holds can trap on missing items if set to do so. King County allows holds on missing and lost items. Items do not appear on the pull list.
- Target weighting is available in Evergreen.
- Holds can be overridden—even at self-check
- Patrons can see where they are in the queue, but King County did not turn on the “expect this item....when” feature
- Expect telephone notification in 4-6 weeks. King County pays for an additional subscription to Library Elf because email notification isn’t that overly reliable. They hold items for 12 days due to the extra time it takes to mail the notifications. They use the UMS mailing database, so it’s faster.
- Patrons and staff have the ability to freeze anything except items currently on the hold shelf.
- She wasn’t sure, but she thought there was a template for holds slips. Yes, they use thermal paper for their receipts. Ability to customize the receipts, including the holds slips that print whatever data you want—including a holds alias for their self-serve holds—they then shelve spine down.
- Transfer holds—highlight, then “find another target.”
- You can move holds to top of queue and “target” a specific copy.
- 1 queue only in Evergreen. (No Bib and Item queues as in III)
- In III you change a hold by replacing it or creating a new hold. In Evergreen, it’s merely the same hold, just different barcode—so you ask to “retarget” the hold, it shows up on the pull list and the patron remains the same in the queue.
- Pull lists can be organized any way—by library sections, etc.
- Replacing a cancelled hold via the patrons cancelled holds list is really easy in Evergreen.
- There are metadata holds in Evergreen—patrons can place holds on all copies of a title, regardless of format.
- Volume numbers are a “great grief”
- Searching in the OPAC is a whole other pond—biggest complaint. Slow.
- King County does have ecommerce, just not through their self-checkout stations. They built their own self-checkouts.
- “We were darn thorough about what we wanted to do.”
- Their wish list includes a parking lot for holds—example: they allow only 25 holds at a time (a lot to do with the political environment, Seattle Public)—so they wanted patrons to be able to put holds in a parking lot. (Like Netflix model?)

King County required features that “aren’t there yet”

An upgrade to the clear hold shelf list—system does not clear holds cancelled by staff or patrons—you have to read your hold shelf manually.

An upgrade that puts a hold in the in-transit status or another status. It doesn’t put the hold on the hold shelf automatically.

Shelf check list—system can note how many times something was checked on the shelf (related to missing items---how many times staff looked on the shelf for something)

Cataloging Task Force Final Report

July 21, 2011

The Evergreen cataloging interface is a curious mixture of very sophisticated features, which may not be necessary or needed, and missing basic functionality which is critical to cataloging efficiently. Catalogers on this task force evaluated the functionality and usability of the Evergreen software by importing and editing MARC records, adding and editing copy volume and item records, and generally attempting to use the software as they would during a usual workday.

Gaps in functionality were identified and then prioritized by answering these questions:

Does the functionality currently exist in the ILL cataloging module?

These gaps are prioritized as level one. An eiNetwork board priority ensures patron empowerment features currently in ILL are preserved. We should do no less for our staff, ensuring that all current features which improve workflow, ease MARC editing, and serve as checks against errors, are available in the Evergreen software.

How will the Evergreen software directly impact cataloging workflow?

How usable and easy is the interface for staff with varying levels of cataloging skill? Gaps in these areas, which impede productivity to a lesser extent, are coded level two. Page navigation and display issues are significant in many areas. Drop down box options would definitely improve the consistency of data. Staff training needs will be extensive even with these improvements.

What general features of the Evergreen software and interface could be improved for better patron and staff usability?

New interfaces should do something better for the user, encouraging them to learn new techniques with the promise that it really will be nicer. Identified gaps in this category are coded level three.

Please see the Excel spreadsheet for the list of additional cataloging gaps identified which were not on the Master gap list provided by eiNetwork. It is our finding that, at this time, that there are significant functional deficiencies in the cataloging module which will greatly impede staff workflow and productivity. This in turn will seriously affect our patrons negatively in their ability to have access to the newest materials. Evergreen does not currently meet the standards we expect in an ILS and we do not recommend moving forward with this project at this time.

Respectfully submitted

Helen Palascak, Chair - Cataloging taskforce