

Evergreen ILS Task Force Report

Task Force: Evergreen Patron Interface Taskforce [ePIT]

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Summary:

As Chair of the Evergreen Patron Interface Taskforce, I'd like to thank my fellow taskforce members for their hard work and effort. Given the constraints, we have used a variety of strategies to test both the eIN Evergreen Test Environment and other Evergreen library/system catalogs available online—concentrating particularly on King County. Our observations are submitted below.

In addition, we have been exploring what the “next generation” library catalog should look like and how it should work. I have been most impressed by an opinion piece by Karen Markey entitled, “The Online Library Catalog: Paradise Lost and Paradise Regained?” <http://www.dlib.org/dlib/january07/markey/01markey.html> I suggest that all members of our organization read this article.

I firmly believe that, as information professionals, we should own, control and manage our own information infrastructure. This investigation has much merit and will spark a great deal of thinking and discussion.

A key topic for consideration is the “replacement of our outdated Boolean-based catalog with post-Boolean, probabilistic retrieval methods that characterize Google and other web search engines.” (Markey, 2007) We are currently trying to determine what retrieval methods Evergreen employs; I suspect that it uses Boolean-based retrieval methods.

At this point, and without consulting other members of ePIT, further investigation of Evergreen is unnecessary from the standpoint of the Patron Interface. Our next move as an organization must make it clearer, easier and simpler for our patrons to search not only our library catalog, but also library websites as one integrated whole.

In identifying this showstopper/deal-breaker, it is not my intention to indicate that we shouldn't move to Evergreen, but rather that the Patron Interface first needs a great deal of work.

It is my intention to challenge our organization to make the commitment to create and develop the next generation catalog. We *can* develop this model if we focus our time, talents and resources on this challenge. It is perhaps our greatest challenge – not only to our County, but also to our profession.

I have recently distilled my vision of the purpose of libraries – that we can make people's lives better by teaching them to use the quality educational, informational and entertainment resources we have to offer. Our catalog/websites must serve people in their endeavors. Our web presence must support our actions and our tools must be easy for untrained individuals to use. Our message to people needs to be that the library, now more than ever, can help them. The resources we offer must change and adapt if we hope to better people's lives and make our vision a reality.

Evergreen Observations – Not So Good

Functional Area	Member	Function	Description	Number
OPAC	Kelley	DESIGN	Hate the Burns Library design!!	PAT- 0010
OPAC	Kelley	DESIGN	King County's 'reviews and more' page looks so 1998!	PAT- 0020
OPAC	Kelley	DESIGN	I was surprised that King County doesn't have the cover images available	PAT- 0030
OPAC	Christy	DESIGN	King County catalog - font is very small - accessibility issues	PAT- 0040
OPAC	Kelley	DESIGN	King County reviews page - YUCK!	PAT- 0050
OPAC	Caralee	HOLDS	Place a group of holds is not an option; they are placed individually	PAT- 0060
OPAC	Kaarin	MOBILE CATALOG	Problems with sizing. Going into catalog, too small, after searching, too big and a second layer opens so it's all wonky looking. (King County)	PAT- 0070
OPAC	Kaarin	MY ACCOUNT	Terminology under Account Preferences is confusing - what is Default Search Location vs. Default Search Range?	PAT- 0080
OPAC	Kaarin	MY ACCOUNT	Needs to have an option to set a default pickup location. Patron shouldn't have to change it each time they request something, if they normally use a branch that's not their "home library."	PAT- 0090
OPAC	Kaarin	MY ACCOUNT	No way to email a list of items?	PAT- 0100
OPAC	Karen	MY ACCOUNT	When logged in to "My Account" - displays full library card #. Privacy issue? - Evergreen Out-of-Box	PAT- 0110
OPAC	Tara	MY ACCOUNT	Can the link to "My Account" be moved? It was not easy to find. In addition, the selections on that line do not seem to go together.	PAT- 0120
OPAC	Sharon	MY ACCOUNT	The Logged in as field shows barcode. I want to see my name, no matter what I use to log in.	PAT- 0130
OPAC	Sharon	MY ACCOUNT	I am only able to log in with bar codes, but the interface says "Enter your username or library barcode." If we don't offer the username option, let's remove that.	PAT- 0140
OPAC	Sharon	MY ACCOUNT	Can't get to log-on link without searching for something. This seems odd. Will there be a link directly to account on the library homepage?	PAT- 0150

OPAC	Caralee	SEARCHING	Claims that searches by location are not available (deal breaker in my opinion) In Georgia PINES, I was able to select a specific library. What does this really mean? location code or location library?	PAT- 0160
OPAC	Kaarin	SEARCHING	I want to see where the items are located on the first page, not have to click on each item to see	PAT- 0170
OPAC	Kelley	SEARCHING	All locations are listed twice as pickup locations?	PAT- 0180
OPAC	Tara	SEARCHING	Can the Location drop-down should be labeled? I could not figure out how to switch libraries easily.	PAT- 0190
OPAC	Tara	SEARCHING	I changed from searching just the Monroeville Library to search Everywhere, but I still see both sets of results. Is that correct?	PAT- 0200
OPAC	Kaarin	SEARCHING	Advanced Search page is horrifying. It's way too busy and cluttered, and I wouldn't even expect power users to differentiate between "Item Form" and "Item Type."	PAT- 0210
OPAC	Kaarin	SEARCHING	Went into a record, now don't see an easy way to get back to my results. The bold words "Search Results" at the top of the record seem like I should be able to click on them, but no.	PAT- 0220
OPAC	Kaarin	SEARCHING	Accidentally clicked on the author's name in a list of results and got to a new search.	PAT- 0230
OPAC	Kaarin	SEARCHING	Would like to be able to choose how many results I see in one page. Default seems to be 10.	PAT- 0240
OPAC	Tara	SEARCHING	There is a link to return to the start of the search results pages, but there is not a link for "End". Can one be added?	PAT- 0250
OPAC	Kaarin	SEARCHING	Don't let the catalog suggest the same thing that I just typed when it doesn't find any hits. It makes me think that I mistyped something, so I click it and just end up in the same place. See ePIT - Wish List - "When 'no results' happens - a MUCH more helpful page displays" --KB	PAT- 0260
OPAC	Kelley	SEARCHING	Should be able to hover over search results 'title' and see full title	PAT- 0270
OPAC	Kelley	SEARCHING	Format when I requested a movie is listed as 'moving image?'	PAT- 0280
OPAC	Kelley	SEARCHING	Don't like the 'video recordings' wording option in the drop-down formats menu	PAT- 0290
OPAC	Kaarin	SEARCHING	MARC record in the Patron interface clutters	PAT- 0300
OPAC	Caralee	SEARCHING	Default search range is confusing	PAT- 0310
OPAC	Caralee	SEARCHING	Ability of selecting books into a bookcart and then placing the hold the current option does not have this ability	PAT- 0320
OPAC	Caralee	SEARCHING	not able to test ability to save favorite searches.	PAT- 0330
OPAC	Caralee	SEARCHING	EINetwork evergreen suggests alternate spellings using the terms (Maybe you meant this); the Georgia PINES does not show this option for certain words like Caribbean or calendar (did work for an alternate spelling of atheist)	PAT- 0340
OPAC	Tara	SEARCHING	Why does the Advanced Search option in the left navigation bring up a different way to search than clicking on the Advanced button under the place to enter search criteria? I found this to be confusing.	PAT- 0350
OPAC	Kelley	SEARCHING	Should the 'marc record' really be available to the public? NO!!!	PAT- 0360
OPAC	Karen	SEARCHING	I don't really understand why people would need access to the MARC record?	PAT- 0370

OPAC	Kelley	SEARCHING	Don't like the placement of limiting options when searching (title, formats, branch)	PAT- 0380
OPAC	Sharon	SEARCHING	I'd like to be able to set a personal default for search type, i.e. author or title, so it always started that way when I'm logged on.	PAT- 0390
	Sharon	SEARCHING	I don't see a link to the databases like the Find Articles in the current catalog .	PAT- 0400
OPAC	Sharon	SEARCHING	When I searched for a video (Chariots of Fire), results show 1 copy in Scott Township and 84 elsewhere. Even though I have it set to search Everywhere, only Scott's copy shows. I changed to search Monroeville. Then I changed back to Everywhere and the setting stayed in Monroeville.	PAT- 0410
OPAC	Mark	SEARCHING (Author) mekons	Same as previous search; 1 click to view record, 2 clicks to view contents, detailed description, etc.	PAT- 0420
OPAC	Mark	SEARCHING (Author) clovers	Click title to view minimal record, locations; must click contents tab to see track listing.	PAT- 0430
OPAC	Mark	SEARCHING (Author) Matches chalmers johnson AND Item Type = Book on CD	"Matches" search only works if you type author's name "firstname lastname" and not vice versa, which seems unintuitive; it works either way in Millennium catalog.	PAT- 0440
OPAC	Mark	SEARCHING (Keyword) Contains kafka and Language = Japanese	Clicking "Advanced Search" from the results screen takes you back to Advanced Search screen with keywords and delimiters from previous search retained; no "ANY" choice under language, so to remove language delimiter searcher must go back to KCLS home page and start over (unlike in Millennium catalog which includes "ANY" option under language).	PAT- 0450
OPAC	Mark	SEARCHING (Subject) bengali language films	More information than I would like on first results screen; Millennium catalog gives only title and format, which makes browsing results list easier; clicking title in Millennium catalog brings up full record; clicking title in KCC brings up minimal record which still requires more clicks to see subject headings, content, detailed descriptions, etc.	PAT- 0460

Evergreen Observations – Good Features

AREA	Member	Function	Description	#
OPAC	Kelley	Enhanced Content/Social Media	Like the 'browse in google books' option (Grand Rapids Evergreen)	PAT-0470
OPAC	Kelley	Enhanced Content/Social Media	Like the 'buy this book' option	PAT-0480
OPAC	Kelley	DESIGN	LOVE Grand Rapids Shelf Browser and their recommendations!	PAT-0490
OPAC	Kelley	DESIGN	Love how this [OPAC] looks at King County	PAT-0500
OPAC	Karen	DESIGN	Love the drop-down tab for different parts of the record (summaries, etc.)	PAT-0510

OPAC	Sharon	DESIGN	I really like the feature for setting the type bigger.	PAT-0520
OPAC	Sharon	DESIGN	I like the column on the left for refining searches.	PAT-0530
OPAC	Caralee	MY ACCOUNT	Default search location is a plus. (a few customers have asked for this feature)	PAT-0540
OPAC	Kelley	MY ACCOUNT	LOVE batch-notices - I hate getting 19 emails all at once!	PAT-0550
OPAC	Kelley	MY ACCOUNT	Like that you can subscribe to others' bookbags (librarians should have them prominently displayed for patrons to subscribe to!)	PAT-0560
OPAC	Kaarin	SEARCHING	In the refine your search area on the left, I like that the Relevant Subjects is at the top rather than Authors. It seems like it's grouped, too, all Author refinements, Subject refinements and Series refinements together.	PAT-0570
OPAC	Kelley	SEARCHING	Like the location search preferences in my account - should this default to 'everywhere' for everyone? What does 'local library system' mean? (vs. everywhere?) for limiting locations of search	PAT-0580
OPAC	Karen	SEARCHING	If you search for a series title (i.e. Goosebumps) books that are part of the series come up. This is good.	PAT-0590
OPAC	Sharon	SEARCHING	I like that the page in this demo site load fast. That's a relief after perusing the King County site!	PAT-0600
OPAC	Sharon	SEARCHING	Option to search by ISBN looks useful -- more precision on searches from Amazon or wherever.	PAT-0610
OPAC	Mark	SEARCHING (Keyword) norway guide*	Results all or nearly all relevant; again, several clicks need to view full title information.	PAT-0620

Evergreen Observations – Wish List

Functional Area	Member	Function	Description	Number
OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	Notifications by text	PAT- 0630
OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	RSS to new books in certain subject areas or locations	PAT- 0640
OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	Options for sharing content, blog entries, websites, reviews, videos	PAT- 0650
OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	Subscribe to titles, authors, subjects and when new items are added, hold is automatically placed?	PAT- 0660
OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	Titles connected to events (garden books - see gardening events at your library!)	PAT-0670
OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	Ability to 'like' each title on FB or recommend to a friend	PAT-0680

OPAC	Kelley	ENHANCED CONTENT/SOCIAL MEDIA	Ability to accept enhanced OPAC content from vendors, e.g. jacket images, full text reviews, tags, read alike suggestions, etc. System will support LibraryThing, ChiliFresh, Content Café, LiveChat, and other vendors.	PAT-0690
				PAT-0700
OPAC	Sharon	ENHANCED CONTENT/SOCIAL MEDIA	Here's an idea: Set up some type of super Amazon Associates relationship. Get people to launch Amazon searches from library site or catalog with library account credit for purchases made from that portal.	PAT-0710
OPAC	Caralee	HOLDS	Recommend the ability of selecting books into a bookcart and then placing the hold the current option does not have this ability	PAT-0720
OPAC	Caralee	MY ACCOUNT	Customers need to be able to print a list of checked out items and due dates. This needs a printer friendly version.	PAT-0730
OPAC	Kelley	MY ACCOUNT	Save items in reading lists, add item notes, change order of holds	PAT-0740
OPAC	Kelley	MY ACCOUNT	Messages between staff and patron through my account!	PAT-0750
OPAC	Kelley	MY ACCOUNT	Online donation to library	PAT-0760
OPAC	Kelley	MY ACCOUNT	Easily printable receipt from my account at any time	PAT-0770
OPAC	Kelley	MY ACCOUNT	Have 'an account' to pay for fines, prints, lost books, donations, etc.	PAT-0780
OPAC	Sharon	MY ACCOUNT	Patrons are likely to encounter log-in problems with forgotten PINs and such things when the library is closed. Can we set it up with an emailed password reset system? Requiring them to call prevents them from using our services 24/7. I'd be pretty unhappy if this caused me to accrue \$4 in overdue DVD fines because I couldn't get on the web and renew at 9:30 pm ...	PAT-0790
OPAC	Kaarin	SEARCHING	Would like to be able to choose which tabs/information to show once and then have it show on all the records I open. Either that or the detailed record (subject, contents, author, detailed description) should be the default.	PAT-0800
OPAC	Kaarin	SEARCHING	Would like to be able to jump to a particular place in a list of items sorted by title for authors of many items. E.g. I'm trying to see if we have the complete short stories of Tolstoy, so I want to search by author, sort by title and see a listing with the uniform title Short Stories	PAT-0810

OPAC	Kaarin	SEARCHING	Says RSS feeds of any search are available in Ver. 1.6, but I can't find anyone using them. (An evergreen developer says that they're in my browser, rather than on the page, but that may be too advanced for me.)	PAT-0820
OPAC	Kelley	SEARCHING	Ability to request items not in the catalog?	PAT-0830
OPAC	Kelley	SEARCHING	Tag cloud of top holds placed that day/week/month	PAT-0840
OPAC	Kelley	SEARCHING	Tag cloud of books recently returned	PAT-0850
OPAC	Kelley	SEARCHING	When 'no results' happens - a MUCH more helpful page displays	PAT-0860
OPAC	Kelley	SEARCHING	Staff chat box on all search results pages! staffed during lib. hours	PAT-0870
OPAC	Kelley	SEARCHING	Great lists available on catalog page like Topeka & Shawnee County Public Library	PAT-0880
OPAC	Kelley	SEARCHING	Ability to email title entry or search results to self/others	PAT-0890
OPAC	Kelley	SEARCHING	Downloadable experience seamless	PAT-0900
OPAC	Kelley	SEARCHING	Sort titles in a series in series order!!!	PAT-0910
OPAC	Kelley	SEARCHING	Ability to tag and write reviews	PAT-0920
OPAC	Kelley	SEARCHING	The 'did you mean' options with misspellings or wrong titles	PAT-0930
OPAC	Kelley	SEARCHING	Staff can access a list of most popular searches, terms and sorts	PAT-0940
OPAC	Kelley	SEARCHING	Ability to create pre-defined searches and make them accessible to patrons	PAT-0950
OPAC	Kelley	SEARCHING	Ability to view movie trailers within catalog	PAT-0960
OPAC	Kelley	SEARCHING	Amazon doesn't have a search help page- why should we have an OPAC where one is needed? (KB)	PAT-0970
OPAC	Sharon	SEARCHING	I'd like it if clicking in the search field selected everything for clearing (as in browser address field) rather than having to do that by hand.	PAT-0980
OPAC	Sharon	SEARCHING	I'd like to be able to set a personal default for search type, i.e. author or title, so it always started that way when I'm logged on.	PAT-0990
OPAC	Sharon	SEARCHING	Option to search by ISBN looks useful -- more precision on searches from Amazon or wherever.	PAT-1000