THE EVERGREEN PROJECT

IT’S A FEATURE, NOT A BUG

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>> It is 4:00 so I'm going to set up by thinking the ever in community development initiative for helping fund the conference. They are conference sponsors and I want everybody to make sure that they send them a lot of love. Because we need money to do things like this. Thank you. So I'm going to hand it over to Andrea and Ruth for If This Then That Action Triggers are More than Just Notices took is a feature, not a bug.

>> I have shared my screen. Welcome, everybody. Two it's a feature, not a button. I'm Andrea Neiman from Equinox, where I am a developer project manager and with me is my longtime friend and colleague, Ruth Frasur from Evergreen Community Development Initiative in Evergreen, Indiana. And we're going to talk to you about the new features in 3.6 and 3.7. This isn't completely country has appeared there are a lot of cool things that when it was that these releases, so we will get what we can and hopefully we will have a little time at the end for questions.

Here is our outline. In years passed I have done this presentation, we have usually grouped it into these are the features in this release and the to the features in another release. This year we decided to be the librarians that we are and classify things.

So we will talk first about OPAC features. Then talk about angular features. Then if you miscellaneous quality-of-life improvements, the course materials, which has it on section, and then give credit to all of our community funders and developers who spotted all this great work and then we will give you some time for Q&A. There also be time at the end for links with documentation and release note if you want to read more.

So without further ado, OPAC features.

>> I made a list of who's going to talk about things, but I didn't actually share it with Andrea. I think the program description is this is the Ruth and Andrea show. This is part of it. Also in keeping with the categorization and classification librarians to please know that since we do not actually have a standards body for this presentation, it's kind of arbitrary other than that picks others a little bit more going into their.

The first thing we will talk about is the BOOPAC. And that is how we are going to be referring to it as often as we can, although it is the Bootstrap PAC using the bootstrap toolkit. This was done at least at the beginning stages five Chris from Niagara Falls Public Library and a consortium that they are associated with peer and it was to make a more responsive OPAC. You can see here there are definitely calls back to the template toolkit OPAC that we know and love. And then you can also see it as it looks on a mobile screen, which is a little bit trendier for patrons, hopefully.

This is one of my favorite features. The condensed and may be simplified, it looks nicer, for the my account feature of the OPAC. If somebody especially if we are talking about using a mobile device where we can actually get at those things we don't have all the rendering issues that the TPAC has on mobile devices.

I am also watching chat. Anything else you want to say about the Bootstrap OPAC. This could be an entire session. So much work went into this but so many people definitely a huge shout out to Chris for getting the ball rolling on this and doing the investigative work as far as bootstrap develop echoes and all that.

>> That's just generally, it's more responsive. And is more accessible. And it just looks so much nicer and more modern than the old TPAC, which has been venerable and served as its many years, but --

>> Remember the presentation in 2012 about transitioning to the TPAC from the JPAC? This is something you can just turn it on.

So this actually becomes the default OPAC. It's not in 3.6, but is it in 3.7 it becomes the default?

>> In 3.7, if the default in 3.6, it's available. You can't use book, you have to pick one system. You can use the OPAC but not the TPAC.

>> Let's go on to Did You Mean. This is part of the 3.7 release. This is the first stage of this but pack certain enhancement that gives suggestions as you can see here for one word, one class searches. That probably seems a little bit primitive knowing that there is some other stages to this to build this foundational thing. Andrea?

>> There is an outline to add more searches and more classes. Actually, currently Equinox is working with EDCI, for making a multiword single path searching. We're going to kind of build on it from there in later stages. We also are working on DIY so you can build your own SRS swaps and suggestions to think about that.

So this first-aid built the interceptor that the others will use as well as the public interface ability for those single word single class suggestions. There are a whole bunch of library settings as well and edit sensitivity. The screenshot shows that we have asked the system to show through three suggestions, and it can in this case show suggestions if you have a certain number of circuits or if you have 0 hits or whatever purpose is obvious that showing that there are hits there, but saying, we found in the data set, and that's in part to, these are not just suggestions based on a random dictionary, this is actually making suggestions based on your product data. So on any of those did you make suggestions, when you click them is not going to say kidding, no results here. These will actually result in hits. So that is a key feature.

>> And this is going to become a more in-depth topic in future conferences for sure. There will continue to be sessions and think about that because this is a pretty technical aspect as far as waiting searches, deciding how you're going to do that. It's an additional skill set for administering.

The other thing I will say about this is this was the first thing that I participated in that was a thing that was developed specifically toward the BOOPAC and that ended up being sort of back into the TPAC. We went out on a limb before we actually knew that the boots back -- Bootstrap OPAC was meant to be anything. We are super happy that it went the way that it did.

>> This screenshot is from the TPAC. I promise it's available in the BOOPAC. Onward.

>> This is super cool. It is going to be something that I fully anticipate you will be talking about to your librarians. Anybody that works at the library. You have hold groups that uses a modified patron user bucket. To place a large number of holds for anybody that is given that bucket. You can access it here to the circulation menu and go on to -- it opens up this modified bucket where you click on the button and create the bucket and then from patron search you can add people to the bucket editing the next screen is going to show the event. One of the things about this is it's kind of I don't want to say first-aid for this. There are a couple of ways that you can place leaseholds. This is directly from that hold group bucket I keep calling it,.

>> It really is a bucket. It's a special case of a user bucket.

>> You need to have the bib ID for the item. I don't want to say it specialize, but then you can also do this from the catalog search and select an item there and select the bucket. So this is a thing that I learned. This does not yet work in the BOOPAC. Works in the TPAC, but that's one of the tickets that I need to do is to have this developed for functionality for the Bootstrap OPAC. This one is in the TPAC, so keep that in mind.

>> That is a problem that some people have been having, they are seeing slide right. Some people have been able to fix that with refresh. I've seen reports of that in other rooms. I think there might already be a bug --

>> I'm sure that there probably is for this one. This was a feature that was developed also by Mike at Equinox, and it was a partnership between Georgia Pines, Evergreen Indiana, and the Consortium of Ohio Libraries. Is it available in the new staff catalog? Not yet.

Looks back isn't it?

>> Is not in the staff catalog yet. I tested it. Had to go through the traditional catalog. That's what I meant to say.

>> What am I doing? You shouldn't have let me drive the slides. What happened to my slides? I actually have them up and somewhere else, too.

We are coming up to Geo sort. This adds a latitude, as an ability to sort by geographic distance. So if you were to click into a record in the OPAC and see the -- consortium, if you don't know where those locations are, this gives you an option to sort those using -- you can enter a ZIP Code or address and click go and it will store it by a sending essence. This is in kilometers. There is a setting to change it to miles. This is calculated by adding latitude and longitude fields to the org unit in org unit settings. So add latitude and longitude to those in the distance will be calculated. This uses a third-party service that is available -- outside of Evergreen. For testing purposes, you can use Google's Geocode or API.

>> I might have done this or I went into Google Maps and got the latitude and longitude for every single library in our consortium. And like, oh, I can use somebody's service instead of doing this.

You can actually enter them yourself.

>> Yes. If you have the geolocation service been enabled, there is a button you click and it will populate. Fun fact, I had a special hate for geolocation services, because I live on the side of a large body of water, and it takes two to two hours to drive there, it's 15 miles away from you. So that is available in 3.7. There was also funded by Evergreen development initiative.

Moving right along, single sign-on. This was funded by Linn-Dalton Community College. This one Equinox did as well. It basically gives you an option to affiliate the OPAC with an identity provider and use a single sign-on service. So this uses shibboleth to authenticate against IdP. If you have multiple I deeply -- IdPs, they can be used and be configured for different locations. It is possible.

There are a bunch of different options with this including you can force everyone to use a single sign-on, in which case your patrons will be transparently redirected to your SSO. And if the SSO is optional, patrons will be presented with an option to use it.

>> There is a question in chat. What is an that are I DP.

>> It's an identity provider. So that is a service that some campuses use an identity provider that can authenticate their students against a variety of services. The independent services. So the IdP is owned the campus services are talking to that. So this gives the ability for the OPAC to make use of centralized services.

>> How is this different from previous ability to use shibboleth as an optional IdP?

>> This is giving you the full scope of control of how to do it including the ability to like I said, you can do optional or forced SSO, you can for sign-out when you have the identity provider, you can have Evergreen configure it on a bunch of elements within stock Evergreen.

I know there were some people in the community using -- and this is in stock Evergreen. I'm not sure if that's what you were thinking of. But it is very cool and a thing will be really helpful especially to academic libraries.

Just to reiterate, this is only for the catalog the public has. This is not for the staff side yet. It could be Sunday with additional work.

>> Rosemary, does that answer the question, rather than it being configured and customized?

>> Awesome. Onward. I think this is still me. The bug for this was actually bringing back lassos. Every time I read that I got the song stuck in my head. So I gave Justin Timberlake a lasso and captioned it bringing lassos. I don't know why that is not in -- I'm feeling on that part. Anyway, what Lassos does with library groups is it gives you a way to create searchable groups of libraries regardless of their OU position. So if you're in a mixed consortium or school public library consortium and you want to repair school levers together and search as a unit, or if you want to highlight your law libraries together, you can do that with Lassos. You can make these globally visible or only visible at certain members or units. We recommend global visibility as a best practice if you allow all searchers to search all locations, making sure they can see all of the Lassos is going to be important.

And in two separate groups, two separate locations depending on whether you're in basic search or advanced search, you can see on the basic search page, the library drops down and the advanced search page is inserted into the where drop-down for you would otherwise do your search scoping options.

To anticipate, they do not currently have the ability to influence things like circulation and hold policy. That is a thing that could be possible with additional work in the future. This was funded by Kale.

>> I can imagine what that would be, especially for a hold, a way to -- anyway --

>> There are a lot of places that this could go. But this is just for the search functionality right now.

And not to put the short shrift, there may be less, some things don't do well with screenshots --

>> The kinds of things we assumed would be there and they weren't, and they have kind of been added and you think of, that was supposed to be there all along.

>> That would make more of a button.

>> It's not really about because the assumption was not correct.

>> I would like to note, there is the occasional cicada on our slides.

>> I love cicadas.

>> Because they are bugs.

Limit to available, this is another one that is only available in the current OPAC template which we call the TPAC. It is not available in the new Bootstrap OPAC yet so when you're looking at a record, the record will only show you the available items so you just toggle the checkbox, it shows you available, you can't toggle it shows you items regard us at the state.

Also in the current TPAC is a read more accordion so you can configure certain fields in the record to truncate when they display in the OPAC and based on however many characters there are in the field you will be prompted with a read more toggle that will toggle to read more or read less.

And also in 3.7, there's a patron option has a new user setting that will show receive overdue and courtesy email checkbox in the patron registration screen. So that is a way to excess your patients to affirmatively opt into overdue and courtesy e-mails. So there is a SQL that your administrator can use to incorporate that.

>> I have a question about that one. Do you know if that is added to the patron registry requested library card form?

>> I don't. If anybody knows the answer to that, drop it in the chat. You're up next fix back so there has been a ton of work done to import -- to Angular. It was Angular JS, and we just say Angular next. And so some of the major things that we have been working on with regards to the acquisitions interfaces, it has been a multiyear project, and we are happy to see in version 3.6, both providers and search go into that. We will take a look at that and kind of her and through some of these other things.

So for these -- for the providers, it is an admin strata thing, and also in the acquisitions menu there are some things there. This has a provide well the provider search, a filterable grid, and a new provider as an new provider model.

This is when I could actually talk a lot about. But this is an unlimited thing. It looks significantly different from the dojo interfaces. Thank you Jeremy, for putting that in here. I am using some jargon and I apologize for that.

This is hopefully more user-friendly than it was previously. You has added some functionality in terms of the filters and things like that to set up acquisitions providers. Acquisitions is one of those I'm going to collect tech services functions that is a foundational workflow in a lot of libraries that doesn't get as much attention as it necessarily should. It really drives the collection development and management.

And then this is the new provider modal that was created with all of that cool things that required fields. Dojo is like that ex you keep finding things around your house even after you have split long ago. I don't want to talk about that right now. This is an online conference pick we can have these conversations.

Once you have actually -- double-click or use the actions to actually go into the provider check all the stuff associated with them and do the configuration that. There is a ton of work that goes into this. This is a three hour training session that I just vomited words out and also made a joke about Rogan's comment.

This is the previous dojo interface for acquisition search. The set has worked. That'll get to say about that. With this new development to Angular, and a ton of work, this is what the acquisitions search looks like. See the search grid below. That sets up a way to easily understand how to addend remove search fields. This is a tabbed display rather than a drop-down. You can choose invoices or selection lists, and if you still love the dojo interface, you can click on that legacy search interface for now. I don't know how long that will stay.

>> It will stay there until the purchase order and -- there are some actions you need to take from search to be able to access purchase orders which is still in dojo. Source not just there for people who love dojo, it's therefore a practical reason.

>> Sometimes we still have feelings for the ex. And that is toxic.

Custom filterable grid, this is for the line items are expect there was a lot of work that went into discussing how this was going to be rendered. This is a very custom grid here. And so I just went to leave it at that. And go ahead and click on the next and you can see each of them. The first one line item search is going to be the most customized of those for tabs for the search because of all the stuff that is in it. And that relates back to what Andrea was talking about, the actual line items. And the purchase orders being rewritten in Angular. So that is going to be a large project, and that is on something that is in process, not entirely sure where in the process, but I know it is an active momentum with Equinox and Bill Erickson from KCLS, and think the guys are interested in. So et cetera, et cetera. We are going to get acquisitions done.

>> We're working on the specifications. And Bill Erickson has done out of this. In the best intentions of open source, we are --

>> We can talk about exes and tires now.

Managing authorities. I'm going to let you do this.

This is a rewrite of the manager authorities in the cataloging menu. That's not all the administrative stuff on the back end, it does have some new stuff in it. And as you can see, there is also a couple more columns that you can see from a column picker, but this is the meat of it, and those links are supercool. If you click -- and I wish this were a lie one because I don't remember how exactly got there, I think you double-click on the actual --

(Multiple speakers)

>> It takes you to this in edit. Some of these are the actual have links. Expect I was looking through that, and I wanted to show them. If you look at the dojo interface, that is unless you are actually running 3.6, and you could see that or 3.7, it does show the number of the link bibs there so this actually then allows you to have those in a list or can I'm going to hopefully get to play with it pretty soon to see what is in the link bibs page and what is linked in there, whether the record ID or title or whatever -- not title, but anyway.

>> It opens another grid that displays.

>> I just want to know what they are.

So I believe this was also by Bill Erickson. He did the MARC batch edit this is the interface that is available in 3.6 and plus through the cataloging menu. One thing that I did discover here is that is not yet linked up in record buckets. So if you're wanting to use this, you can use it from here and there is a lot for the record for the record source. And I have no doubt that this is going to be something that comes out and probably the next release or the release after that.

Regarding link bibs and the authority search. Will authorities ever let you search the 4xx fields if you don't know the established heading?

>> Through open source, maybe.

>> If it's in the ticket, I would encourage you to file one or have somebody walk you through the process of filing one or have somebody else file it for you. Because that seems like something that would be valuable and perhaps not that difficult either. But not all things are practical. That's true.

This is a very nice rewrite of the 2012 that edit again from dojo. Which I think more than anything looks intimidating, but it's more user-friendly.

>> I not make things look so much cleaner and just generally less intimidating. Things work how you expect them to

>> And just having the alternating rows be different colored just kind of draws your eye. It's like a user experience.

>> I did find your notes I now have my assigned slides. We have had a lot going on. We are here and we are talking to you -- we finished the slides more than 24 hours before this education before that because we are awesome.

>> I still had three slides to do three hours ago.

>> Next is the item missing pieces interface. And put scan item missing pieces in the title because that's what it is in the menu, so what this does is it takes the same functionality as the mark missing pieces interface that will generate a print notice to sign and give the option to apply on the note or block penalty to the patient if you so choose, and this new functionality also gives you a scan barcode as shown in the screen, it gives you a preview of the title, author, and you can decide this is the one I want to mark this in pieces, and when you click the green button it connects with the penalty. Just a nice little piece about Angular.

So the last two for Angular, these two local admin interfaces. And these were done by Mike. The shelving location groups gives you an interface for creating your location groups and makes it much cleaner, much more user-friendly as an alternating grid, the to play with it much easier than the old version.

And it gives you a new grid any new model. This one doesn't really photograph will. But you would not interact with these a whole lot except for things you create to connect selling locations for your circ policies. It is much nicer looking

>> And that's in addition to circ modifiers which set some circulation limits.

>> Quality of life improvements. Just some fun things that came out in 3.6 and 3.7 that make your Evergreen life easier, but they are not OPAC related, not Angular related.

>> Anything that has to do with holds is going to make everybody in the entire library experience happier. In this case, hopeless holds, this is a mass link. So that predates ECDI and let us get everything together. And kudos to everybody for all of it.

>> Noble checked into the status for this.

>> This is for those holds that don't have any eligible items anymore so to access it is going to be through the local admin and it's going to bring up an interface that allows you to scope by date and by pickup location to see those hopeless holds and to do something to them. So this is a hold management tool that is now in place.

>> This is super personal for me, because I used to be a circ manager, and I had multiple reports put together using Excel tricks. I was so happy to see this going in. I was cheering for this the whole time because it brought that process into the ILS and made it more automated

>> It's lovely. That one alone is --

>> I did it again.

>> I will always let you drive because this is why people we find new places along the road.

>> While I'm finding where we were in the slides, limited LU something else with hopeless holds, the hopeless item status field, so you can tell Evergreen that if you have items in the head status letter likely to be hopeless, but hopeless holds looks for his old copies that could feel the cold you do not in an hold will status, or in a hopeless status. That hopeless prone field is a new thing that you can assign.

>> That's me. Postpone.

>> Are we back on track now?

>> Yes. Next in 3.6 is test notifications. This is a quality life -- quality-of-life think to make sure that the email addresses are semantically correct so they go to when in box somewhere. This is in both the my account feature, patrons, and then in the staff patron edit interface. And it doesn't show up until you put an email in there, is that correct in the patron edit screen?

>> Correct. How to enter an email and then save it and then send the test.

>> As far as the SMS, I have not had success with that yet.

>> I did not feel like setting up SMS --

>> It requires some configuration. And we are not really lazy, but sometimes we play lazy on TV.

Have we confirmed that in the patron and my account it shows up in the BOOPAC?

>> I was not able to get it to show up in the BOOPAC.

>> That might be a configuration thing.

>> Is in the chat, thank you, clear. Good job on your administrators for setting that up.

>> That's pretty low bar in my case. Andrea works harder than I do.

The GiST to GIN indexing. But you need to know is listed on this slide. Your Evergreen -- it makes things faster and better. And if you want to take a super deep dive into the particulars of what those acronyms mean, as well as what they do, there is the progress, but this is faster and better.

>> That's unfortunately that I think the where do, because I read the article so many times, and I still have not memorized what they mean. So that came out well, faster. Little bit of compromise here, but faster. So I distill it down to not memorizing it.

>> It's documented somewhere and as librarians we outsource that knowledge.

>> I'm not going to be able to give course materials the amount of time it deserves. I'm going to move through these pretty quickly. It is very exciting. It's not just for academics. This is a very neat feature.

So course reserves, there are new settings associated with it. They really intriguing optimum -- I've seen people suggest with this is managing displays or screenshot examples. The summer reading lists. So in addition to its main intent is an academic feature, and it was some fund by two academic libraries. Has definitely use cases in public library settings is what -- as well.

You a separate course reserves, the main management things are terms, semesters or other large drippings, and then courses which are your subdivisions of terms and roles. And courses you have user's materials and terms associated with them.

And the course set up, this is where you created your course, created reserves, this is where you actually add your items to your course. I have made is high school 20 summer reading 2021. My background is as a circ manager, and this was a whole think every summer evicted. And I would 100% use this feature to do that rather than the paper the way we did before. So this lets you assign the different materials that are part of that in this case, course high school summer reading, I have called this the 10th grade section so it's number 10. And you can set temporary circ modes, colors, and location values for the duration of the course pierce so as you are signing materials you can create temporary parameters associated with each of those items that will revert once you have taken them off reserve. So you don't have to edit all these it's just temporarily getting these new features in a reserved state.

This is what that looks like in the OPAC once you have turned on all the relevant features. You have either search or browse for courses. If your instructor names are public. Or course names, the neighbors, and then search for my favorite fake patron, the instructor here, and this is the course material associated with the high school course and the classical music things they will be reading.

So that was a super short version of course reserves. I'm sorry to give short shrift. Because it is a very cool feature.

>> There is a question from Jeremy, any impact to reporting the ultimate data?

>> I would actually have to take a deeper look at the release notes to see if those are -- I think if they still get shoved out, they are still recorded as circs. Do they count that in their original set of stats for the modified set of stats? I am not sure of the answer to that peer thank you, Elizabeth. It says they will be looking at course reserves at the student success group meeting tomorrow at noon. So I will defer all questions to them.

And in terms of other things we have talked about here, I know that Bill Erickson I think tomorrow evening is going to be talking about the newest and forthcoming Angular things that are on the horizon in addition to the stuff that Ruth and I talked about today.

>> Can course reserves be open or must they be associated with a set of students?

>> In my examples, I just did them open. I think when they are associated with a set of students, I was not able to see if that actually impacted their OPAC display, but I had did not take any super deep dives into that. And that would be a good question to bring to the student success group meeting tomorrow.

Quickly going through our last few slides here, credits. I love this slide because it shows what a community based operation Evergreen really is. These are all the organizations that contributed financially or in kind to all the developer that you saw in the preceding slides. It is an incredible cross section of our community. This is the first slide I built for this deck.

>> It's pretty awesome. So --

>> So thank you for all of these organizations for funding and making all these things possible. Along with that, these are the five people represented the organizations on the right. The developers who did the work. These are all the ones that are responsible for the actual code that went into these features. So thanks all these people for improving Evergreen.

>> Also, everybody that has contributed comments and things in Launchpad and done testing for our testers, I'm speaking from the development initiative, everybody that has tested anything that does not actually get done without them.

Dan put a link in to the chat for a bug related to the notification method testing for the BOOPAC. So if you have a Launchpad account, I would encourage you to go in and add heat to that bug. If you do not have a Launchpad account, I would encourage you to start one and add heat to that.

>> We will be talking about Launchpad tomorrow. So check out that session, too.

All right we were going to have Q&A, so unfortunately you don't have time for my dad jokes. But Ruth and I will be around for the next couple of days. So feel free to grab us across one or several platforms of communication.

>> Can we have one bad joke?

>> Where does a mansplainer get his water? From the well, actually. Thank you for joining us.

>> It's been fun.

>> Your some links for the documentation.

>> The slides will be available.

>> Goodbye, everybody.