MassLNC FY17

Massachusetts Library Network Cooperative

MassLNC

Annual Report

Reporting on MassLNC Activities from July 1, 2016-June 30, 2017

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A Year of Growth

FY17 was a significant year for MassLNC as the cooperative launched the MassLNC Evergreen Development Initiative, a project that invited Evergreen sites outside of Massachusetts to participate in our collaborative development projects. Through the project, five Evergreen sites joined MassLNC as development partners in FY17. The Initiative enables MassLNC to bring more brainpower into the development process, which ultimately leads to better projects that can meet the needs of more libraries, while also growing the funding pool.

In addition to working to enhance Evergreen for our libraries, MassLNC continued to support collaboration between the two Massachusetts Evergreen networks by providing opportunities to discuss implementation of new features, to help each other out, and to prioritize development needs.

We closed out FY17 with the completion (or near-completion) of some long-standing development projects, as well as an exciting grant-funded project. We also had a new list of funded projects to be completed in the next year along with a charge to begin work on a large strategic development project. As has been the case since MassLNC began seven years ago, participants found that continued collaboration among many Evergreen sites leads to a more cost-effective and seamless experience implementing an open-source library system.

MassLNC get-together at 2017 Evergreen International Conference

MassLNC Evergreen Development Initiative
Making Evergreen Development Easy

The MassLNC Evergreen Development Initiative launched on July 1, 2016 as a way to bring more Evergreen sites together to implement new and important features The partnership allows libraries and consortia to stretch their development dollars. With the shared funding pool, participants are able to decide to fund more projects than they would be able to fund on their own and and jointly tackle larger projects that would be beyond one group's ability to fund.

During the first year, five Evergreen sites joined the Development Initiative. Collaborators are full partners in the MassLNC development process, serving on the development committee that selects projects. Idea Generators do not participate on the development committee, but provide input into the process by participating on the MassLNC Ideas site and responding to surveys.

- Bibliomation in Connecticut (Collaborator)
- British Columbia Libraries Cooperative (Sitka) in Canada (Collaborator)
- Evergreen Indiana (Collaborator)
- Georgia Public Library Service (Georgia PINES) (Collaborator)
- Howe Library, New Hampshire (Idea Generator)

Although integrating new organizations into a process can be challenging, the first year of the Initiative was marked by a high degree of consensus among participants. The development committee focused on two tracks of development in FY17: 1) development of smaller features that were selected through our annual Ideas site process and 2) selection of a long-term strategic development project.

The annual development process resulted in funding allocations to code the following projects:

- The ability to search report templates (available in 3.0)
- The ability to retrieve patrons whose records were recently accessed via the client. (available in 3.0)
- The ability to suspend a hold at the time it is placed (available in 3.0)
- The ability to place multiple holds for a patron at one time (targeted for 3.1)

The committee also voted to fund the creation of technical specifications for the following projects. Quotes to code these projects will be delivered in FY18 along with the tech specs:

- The ability to select and perform actions on multiple titles from the search results page.
- Improved printing and e-mail options from the catalog.
- Support for alternate patron names.

MassLNC also met in person and online for focus groups to help with the selection of a long-term strategic development project. The final decision was to move forward with a project to provide a smart and forgiving search that leads to no dead ends. Work will continue over the next couple of years to bring even more search improvements to Evergreen.

More Development Updates

Web Client
We closed out FY17 doing final testing for the new web staff client that will be available for production use in Evergreen 3.0. Contributing funds, testing and other work to the web client has been a top priority for MassLNC since 2013, when we signed on with Georgia PINES and SC LENDS to fund the original prototype.

MassLNC is very excited to see the web client rolled out to libraries. The new client should provide some performance gains over the older client, allow use on a larger range of portable devices, and provide better usability for staff.

Finishing Up Some Long-Standing Projects
Working with Equinox Open Library Initiative: we also made progress on some long-standing MassLNC priorities:
- MassLNC began the fiscal year with the final testing and sign-off for the long-awaited **activity metric** project, which allows titles with a lot of activity to be boosted in search results. This feature is available in Evergreen 2.11.
- MassLNC completed a project to **remove advanced search limiters from the resulting search box.** Applied limiters now display in attractive boxes at the top of the search results screen. This feature is available in Evergreen 2.12.
- Coding was done for infrastructure improvements for authority **cross-references**, providing the groundwork for display improvements that were started by the end of FY17 and completed shortly thereafter. This work is available in Evergreen 3.0
- MassLNC also signed off on code to allow **greater control over alerts that display at check in/check out** and to **give staff the ability to place temporary alerts on copies belonging to other libraries**. This feature is expected to be available in Evergreen 3.1, when there is more widespread use of the web client.

Search Infrastructure Improvements
Equinox completed the first two steps of a three-step project to improve search infrastructure. The initial step was to evaluate the effects of eliminating the two-stage search used in Evergreen. The report found that Evergreen could retrieve a fuller set of results while also improving search retrieval times. By the end of the fiscal year, Equinox completed step two of this project by implementing the code evaluated in the report.

MassLNC will continue this infrastructure work into FY18 with the third stage of this project, which will affect how specific fields are weighted in relevance ranking and how fields are displayed. This project will also include the ability to highlight search terms in results and on a bib record.

Thank You To Our Development Partners!

MassLNC would have been unable to proceed with many development projects without funding contributions from other Evergreen sites. Many thanks to these partners who helped fund the long-standing and search infrastructure projects.

- Bibliomation
- Consortium of Ohio Libraries
- C/W MARS
- Evergreen Indiana
- Georgia PINES
- Pennsylvania Integrated Library System

EBSCO Grant

In October 2016, MassLNC received a grant from EBSCO Information Services to finance development of catalog features. MassLNC used the grant funds to improve Evergreen's *Group Formats and Editions* feature.

Through the grant, MassLNC contracted with two organizations, MOBIUS and Equinox Open Library Initiative, to improve record retrieval during a *Group Formats and Editions* search, allow users to limit these searches by format and other criteria, and, when desired, allows sites to configure this option to be the default search in the catalog. The development also included the addition of *View other formats and editions* links in the catalog record.

The *Group Formats and Editions* search is a great way for patrons to find the title they are seeking without worrying about all of the different editions that are available in their consortium. MassLNC is proud to have worked with EBSCO to make improvements to this feature to make it even more useful for our libraries.

Contributing to a Vibrant Community

In order for Evergreen to be a strong and sustainable ILS for our libraries, the community of users needs do much of the work that falls within the responsibility of the vendor in the proprietary software world. Coding is just one of the many tasks that needs to be done to make Evergreen a good option for libraries. The community also needs to help with documentation, community support, marketing, governance, and developing a strategic direction for the project.

The staff at MassLNC and the participating Massachusetts consortia have always been strong contributors to the project, not just by funding new features, but also by contributing time to ensure the project runs smoothly and remains a good option for libraries. Below are the community contributions that have came from MassLNC during FY17.

Software development
The following Massachusetts contributors added code to the Evergreen software during FY17.
- Jim Keenan, C/W MARS – two code contributions, including a fix to the edition statement in the public catalog display so that it no longer displays MARC fields used for alternate editions
- Kathy Lussier, MassLNC – 62 code contributions, including display improvements to several My Account screens, improved style for the new advanced search limiters block on the search results page, and an improvement to the algorithm that groups together formats and editions to reduce instances where different parts of the same series are grouped together.
- Christine Morgan, NOBLE – three code contributions, including the addition of a link for patrons to view their lists from the record summary page and the removal of the Permalink link when a record is retrieved in the staff client.
- Michele Morgan, NOBLE – six code contributions, including the addition of the acquisitions price field to several staff client interfaces and the ability to click copy locations on the record summary page to pull up a map of the collection or to provide other information about where the material can be found.
- Dan Pearl, C/W MARS – four code contributions, including an improvement for patron search to ignore diacritical marks, punctuation and spaces in a name, a fix to the formatting of LC call numbers of spine labels, and an improvement that strips ending punctuation from author facets and browse headings.
- Jason Stephenson, C/W MARS – 28 code contributions, including an improvement to the utility that exports MARC records and a fix that, upon aborting a transit, prevents the system from changing the copy's status if the status was not "In Transit" at the time the action was taken.

In addition to these code contributions, MassLNC Coordinator Kathy Lussier helped steer the direction of the 2.12 release by serving as **Release Coordinator**. Both Kathy and Jason Stephenson, ILS Manager for C/W MARS, also continued to serve as **core committers** for the Evergreen project. In that role, they are able to merge code directly into the core Evergreen software.

Documentation
Good documentation is important to the success of a software project as it ensures that new users will have guidance in how to use the software and continuing users can quickly come up to speed with new features. Several people from the MassLNC community contributed documentation during FY17.
- Jeanette Lundgren, C/W MARS
- Kathy Lussier, MassLNC
- Dan Pearl, C/W MARS
- Jason Stephenson, C/W MARS

Governance
The Evergreen Community has an Executive Oversight Board charged with protecting the assets of the Evergreen community, managing project funds, overseeing the annual conference, and setting a strategic direction for the project. During FY17, two people from the MassLNC community served on the Oversight Board.
- Ron Gagnon, NOBLE
- Tim Spindler, C/W MARS (chair since April 2017)

Outreach
Marketing the Evergreen project is important for spreading the news about Evergreen to the larger library community, but it also serves the purpose of informing existing users of what's happening with the Evergreen software and community. Publicizing Evergreen helps our community grow, which, in turn, brings more resources into the community, which ultimately leads to improvements for all Evergreen users.

During FY17, the Evergreen Outreach Committee issued press releases about new features in the software, hosted Evergreen sessions at ALA MidWinter and Annual, and produced an annual report highlighting successes of the previous year. Participants of the Outreach Committee include:
- Ron Gagnon, NOBLE
- Kathy Lussier, MassLNC (chair)

In addition, Elizabeth Thomsen of NOBLE assisted outreach efforts by facilitating ALA sessions about Evergreen. Ron Gagnon of NOBLE and Tim Spindler of C/W MARS also helped spread the word by presenting at the ALA Annual session.

Mutual Support

The MassLNC collaboration also allows the two Massachusetts Evergreen networks to support each other in their Evergreen implementations. During FY17, network staff met to help each other out with improved MARC record loading and implementing the new activity metric feature. They also gathered together for an Evergreen community Bug Squashing Day, allowing more Massachusetts staff to contribute to the effort of eliminating bugs in the software. MassLNC coordinator Kathy Lussier also helped networks individually with web client implementation, improving search relevance ranking, implementing the Overdrive API, making catalog customizations, and getting existing customizations into the community code so that they can be available to all Evergreen users.