R&D Updates MUG 2017

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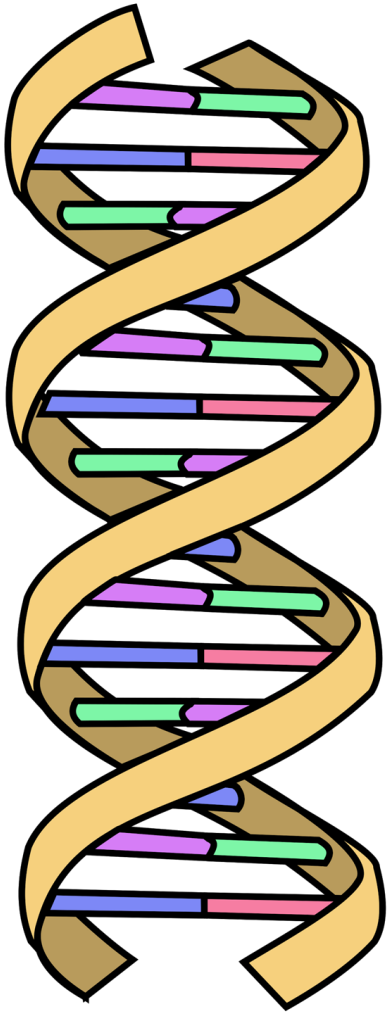
sierra

Sierra integration changes

- ➔ Order Records now use Sierra DNA rather than MARC
- ➔ Extract Due Dates from Sierra DNA

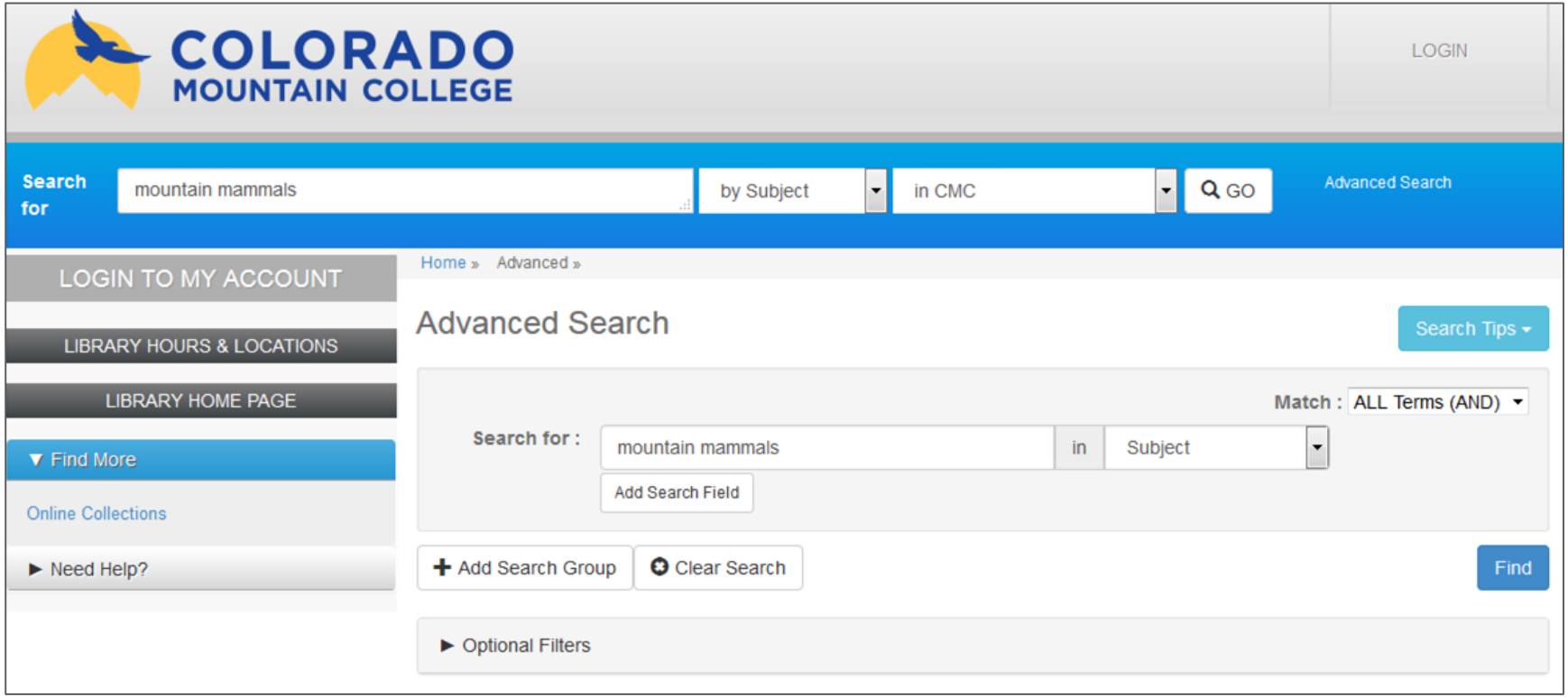
Better format determination

- ➔ New Formats Theses, Music CDs, Music Cassettes, GoReader, VOX Books
- ➔ Updated filtering logic to improve when multiple formats are detected
- ➔ Favor data that is well understood and maintained



Search Enhancements

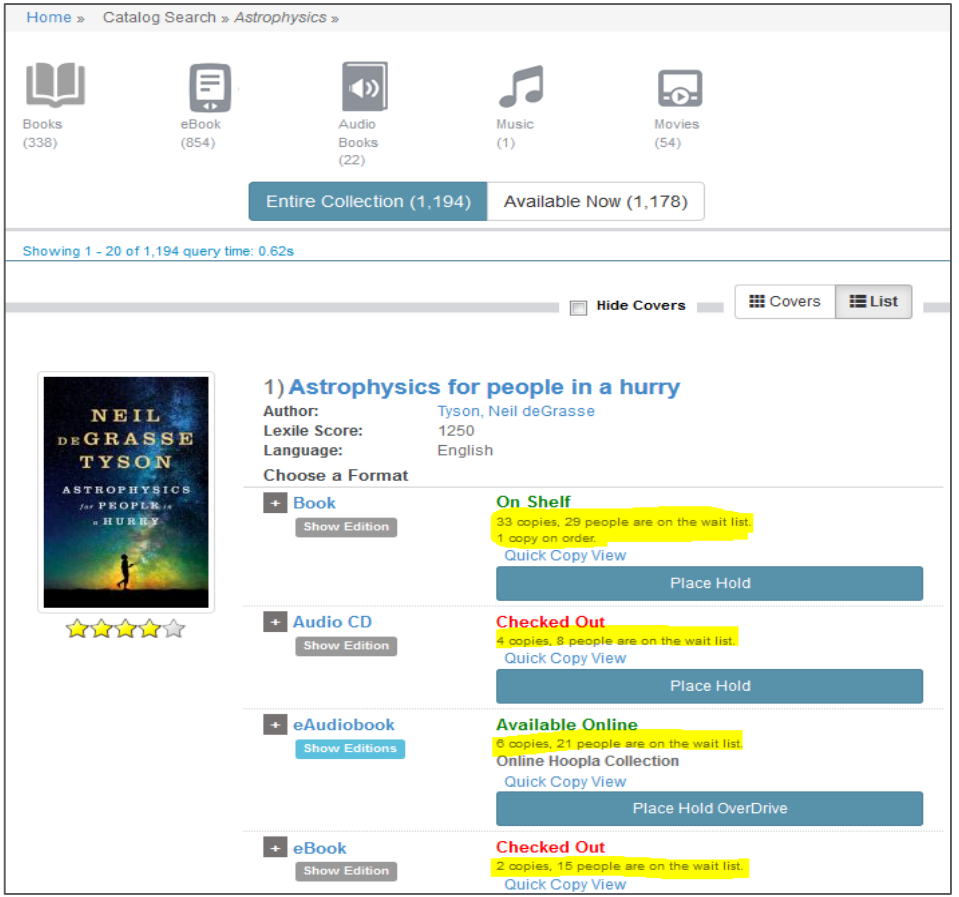
Start an advanced search from a basic search



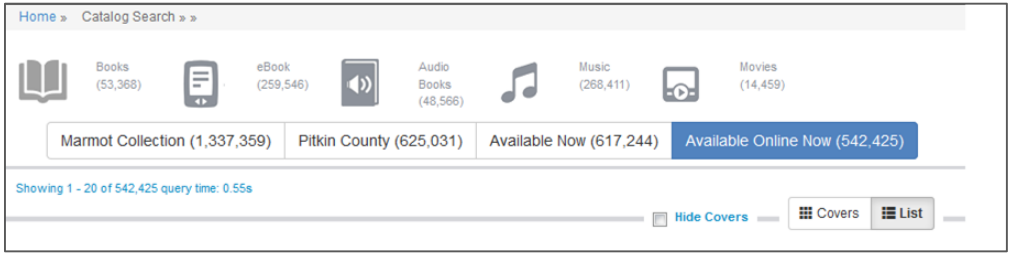
Customize search results

- In search results, turn display of holds and copy count on/off

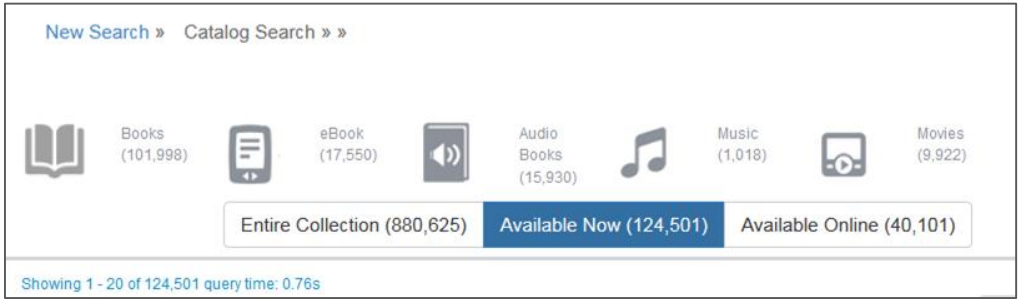
- Within the consortium, patrons have priority for your copies in the holds queue, the counts don't reflect that



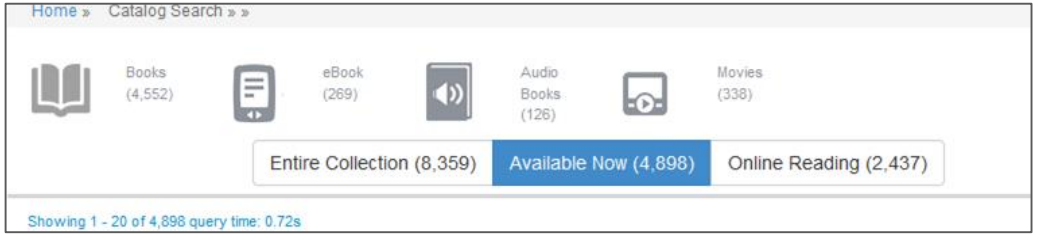
Available Online Now



Available Now without Online Material included



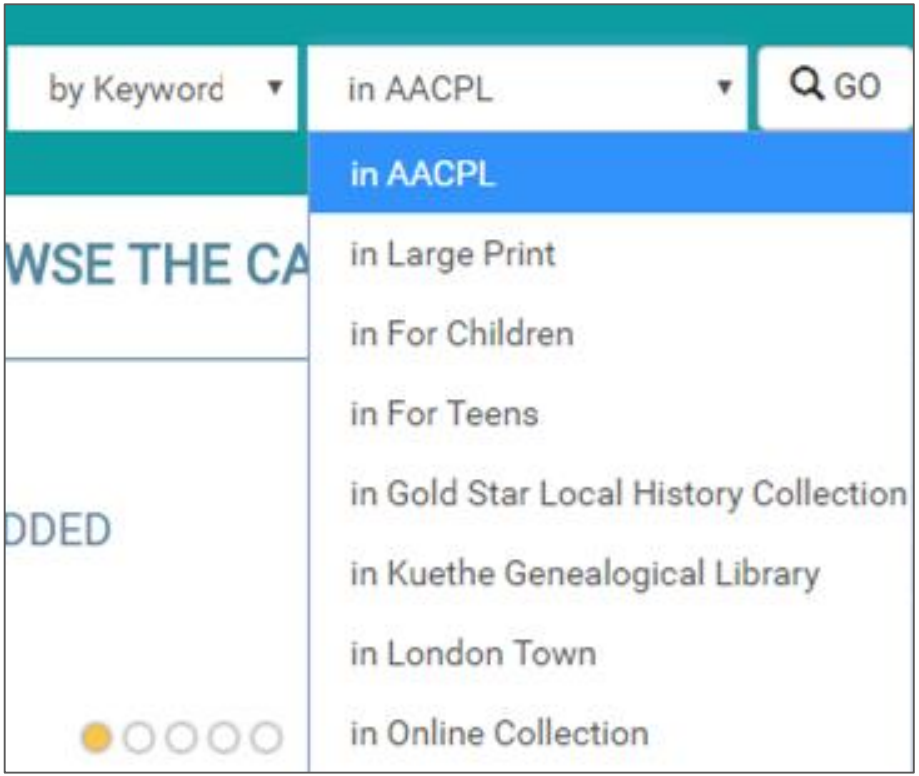
Availability based on location's holdings only



New possibilities for search source options

Pika locations can be based on

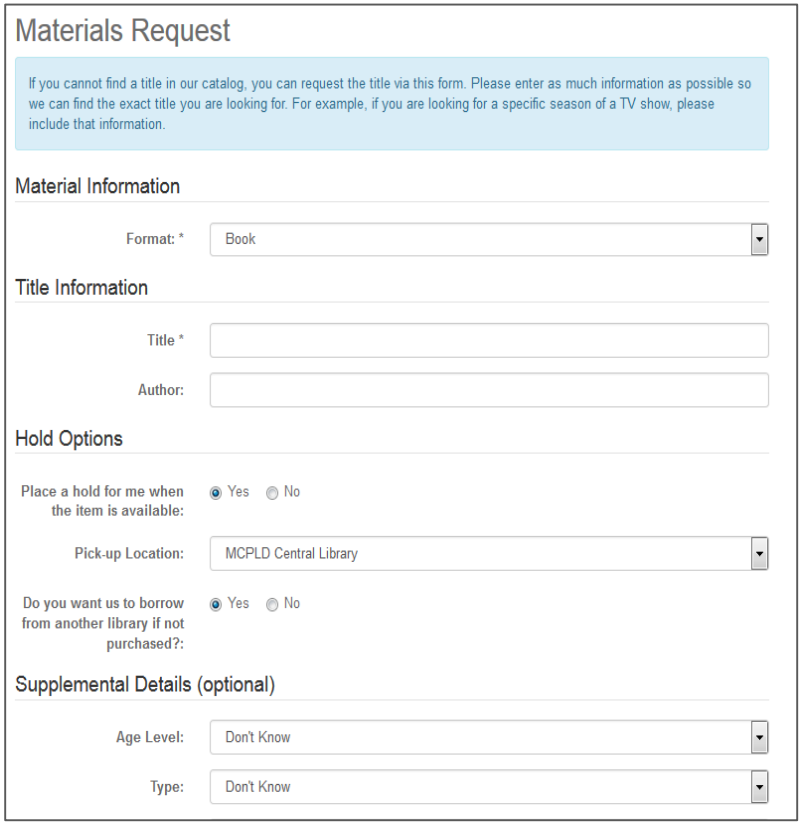
- ➔Format
- ➔iType
- ➔Audience
- ➔MARC tag with a specific value



Materials Request Enhancements

Customize Materials Request Form

- ➔Which fields are displayed
- ➔Change the field label
- ➔Change the field order
- ➔Change category headings



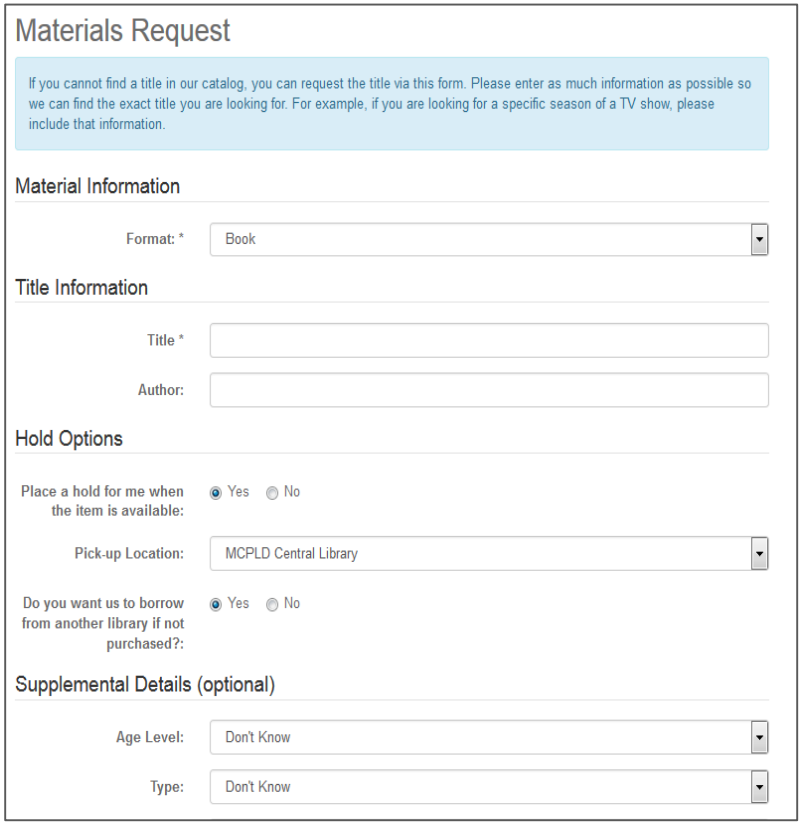
Customize Materials Request Form

➔Update which formats can be requested

➔Change format labels

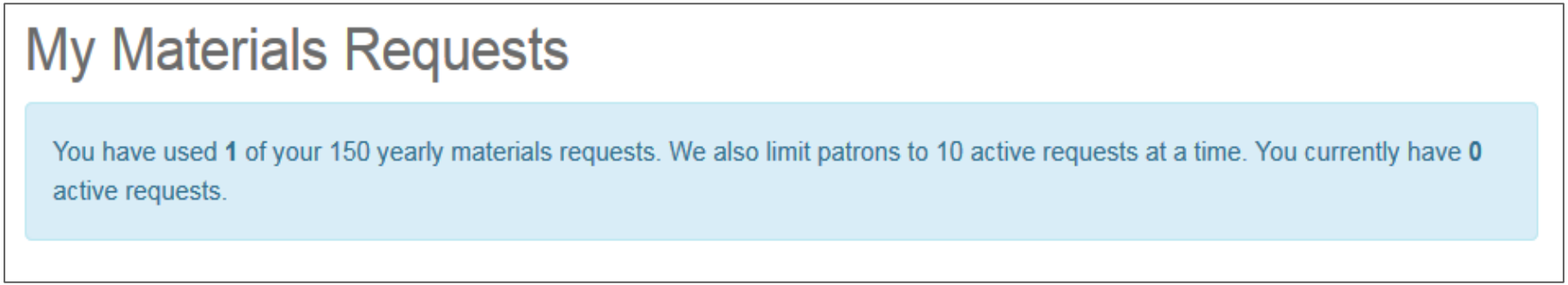
➔Change author label

➔Customize help text



Customize Materials Request Form

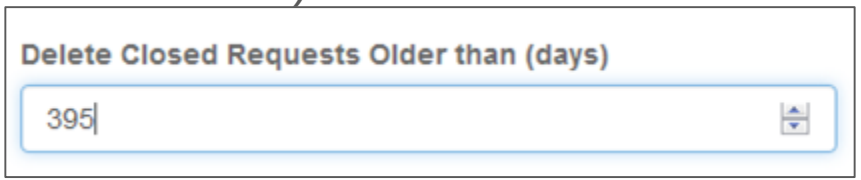
Patrons can see the number of requests made for the year, the number of requests they have open, and how close they are to their request limit.

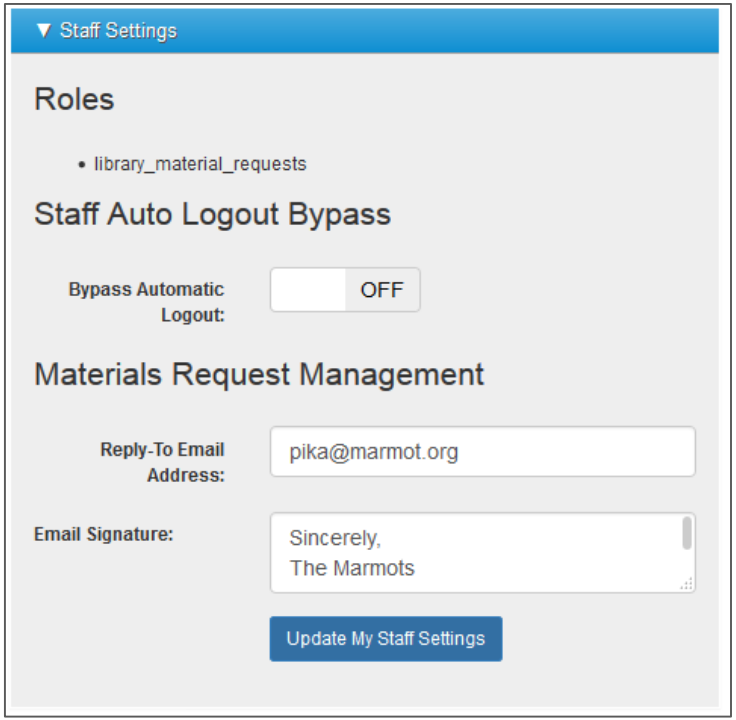


Material Request Enhancements

Request Management Enhancements

- ➔Customized e-mail address and signature to be used when responding to requests
- ➔Automatically delete closed requests after a certain number of days (1 year minimum)

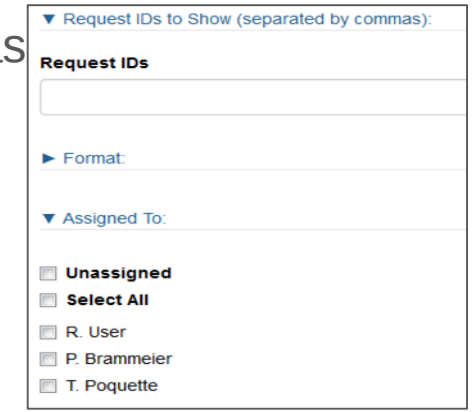


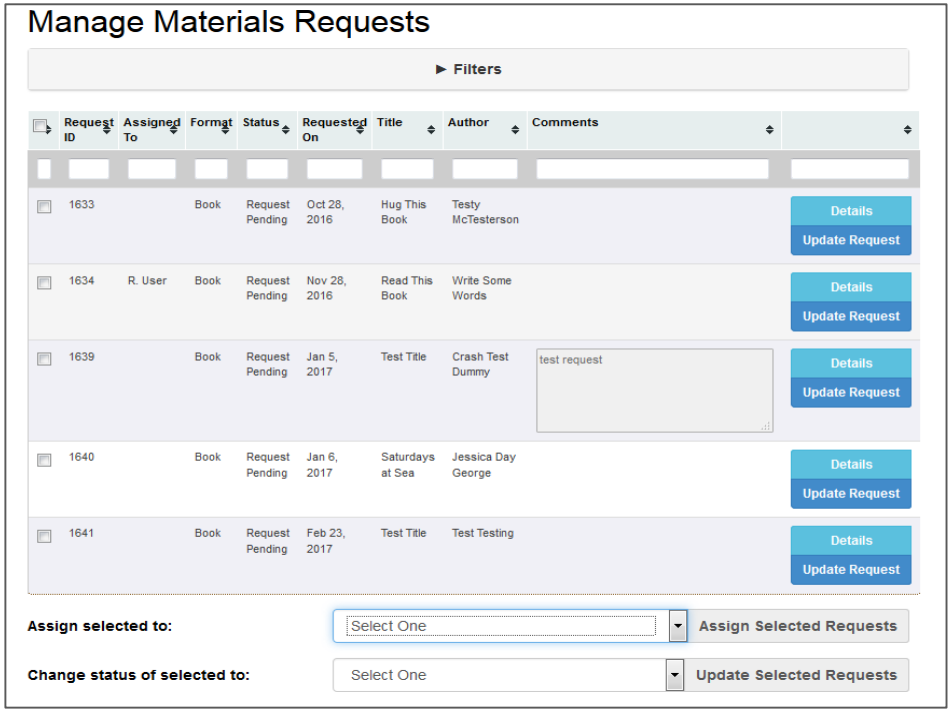


Material Request Enhancements

Request Management Enhancements

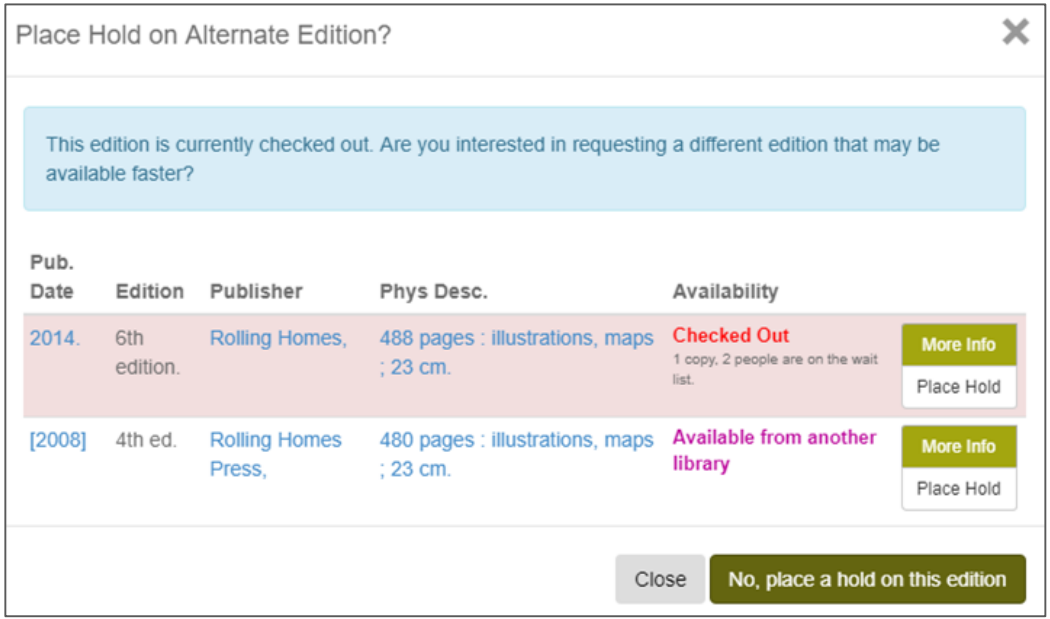
- ➔Fields to list in table
- ➔Assign requests to a staff Person
- ➔Filter list by as request IDs



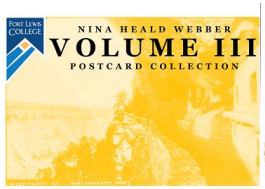


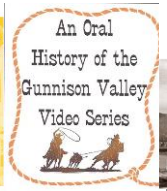
Better holds

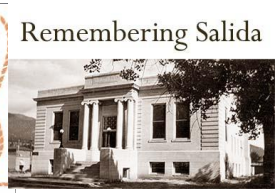
- ➔Handle closed branches more elegantly
- ➔Prompt users for an alternate edition of nonfiction books that can be delivered faster than the preferred

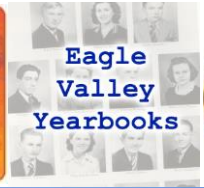


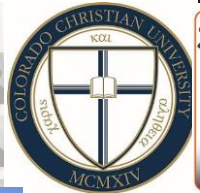
Archives Launched

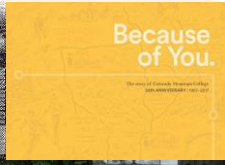


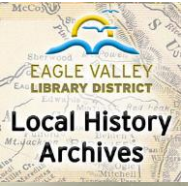


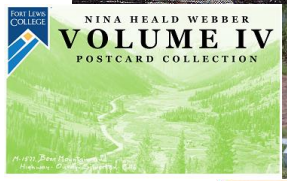


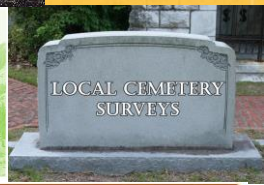


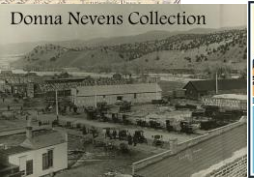


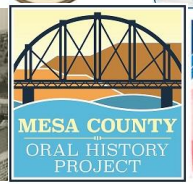


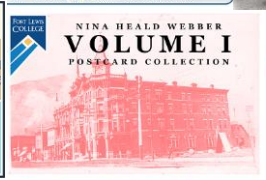


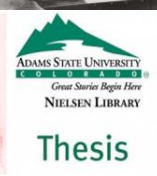


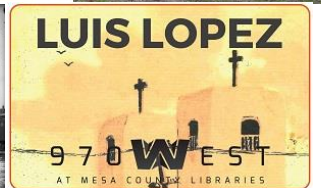


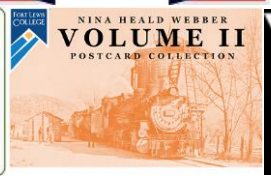






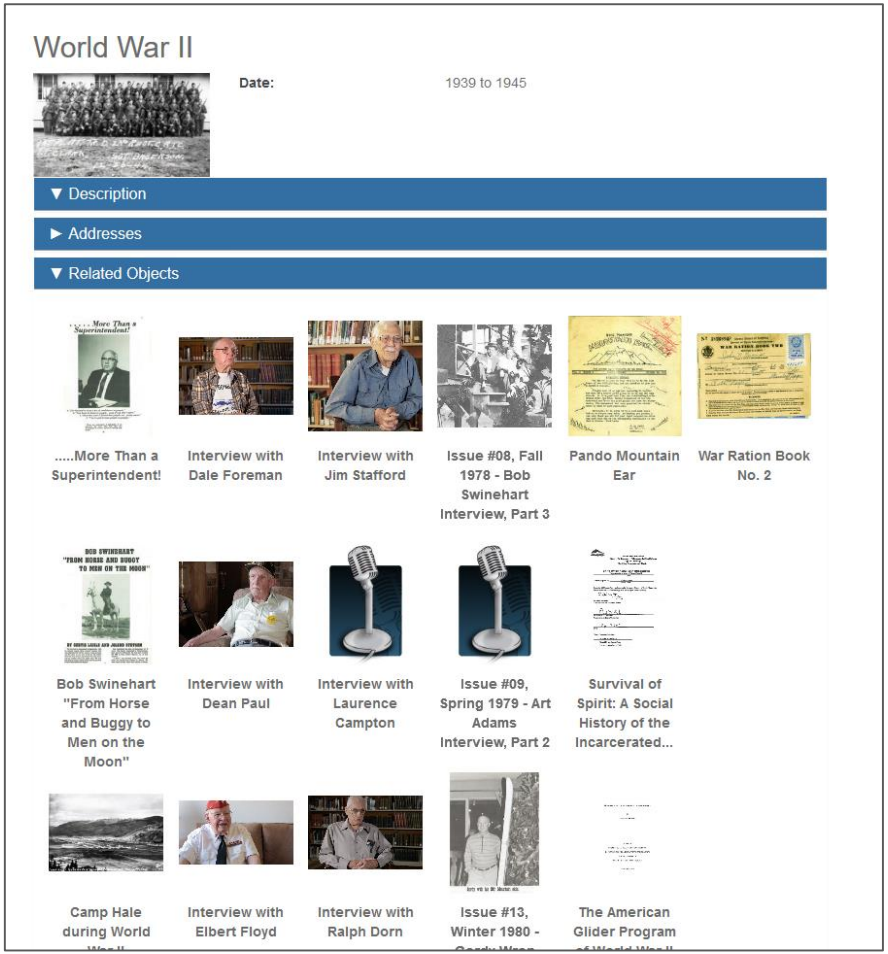




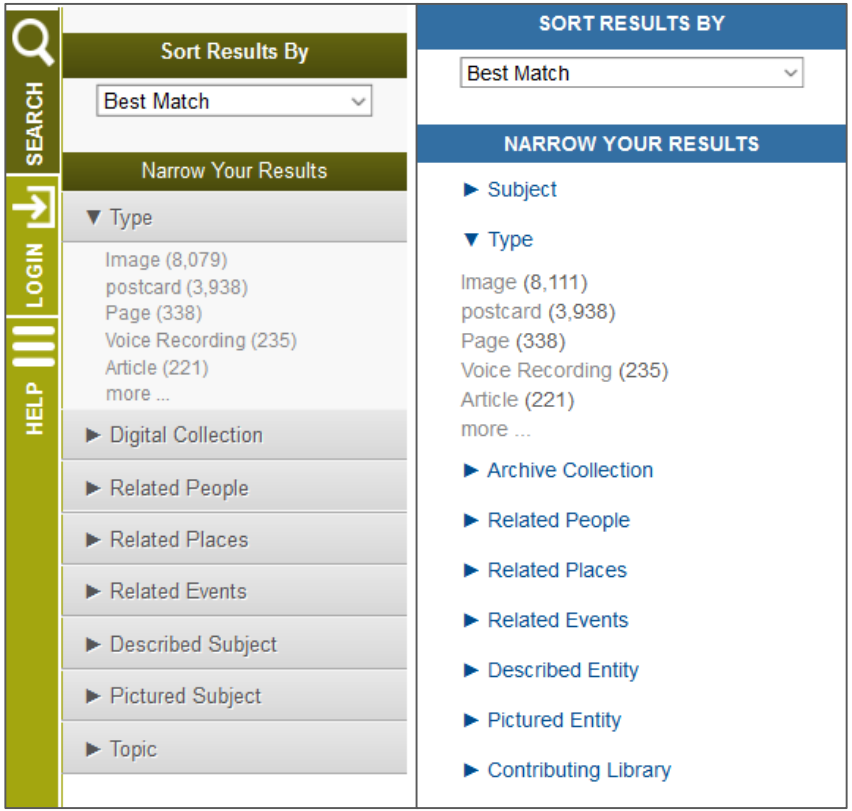


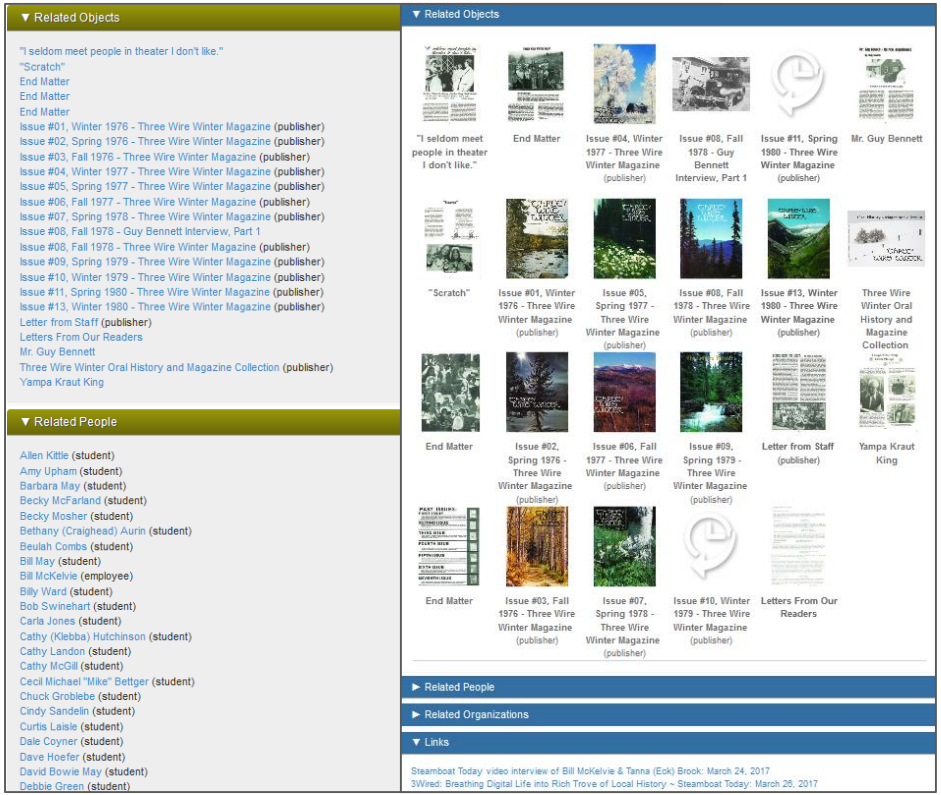
Archive Sharing

- ➔Access to the archive is free for all Marmot libraries
- ➔No need to contribute archive materials
- ➔Limit to specific collections and objects

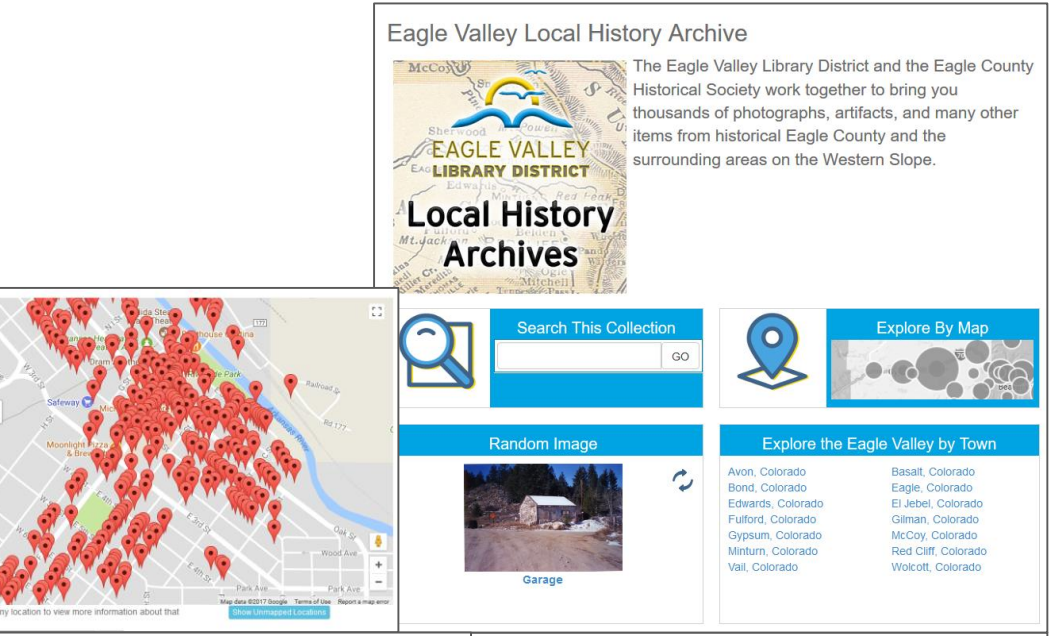


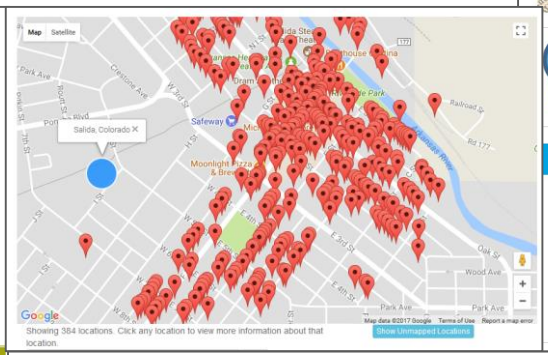
Archive Customization

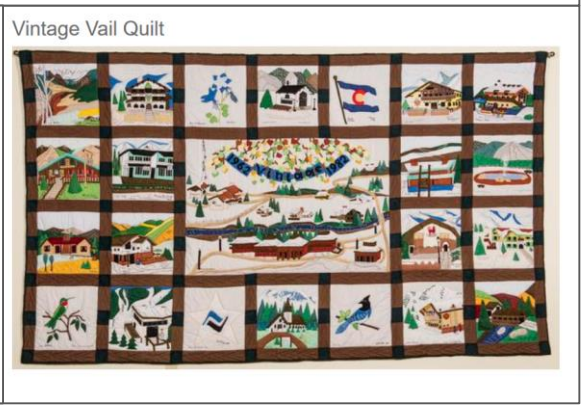




Archive Homepages







Sideload enhancements

- Added the ability to dynamically rewrite URLs when sideloading records to allow proxies or rewrites of URLs by library/location without needing to first edit the records in MARCEdit.

- Automated processing of deletes from a collection.
- Standardized back-end setup and built setup tools to help streamline the setup process.

Sideloads since MUG 2016

- Ebrary for Western State University
- Learning Express for Garfield County, Vail and Mesa County
- Lynda.com for Telluride, Grand County
- Colorado State Gov Docs for Flatirons
- Films on Demand for CMC

- Hoopla for Pitkin and Santa Fe
- Alexander Street Press for CCU
- Anne Arundel Discovery Partner Setup
  - -Gale
  - -RBDigital Magazines (Zinio)
  - -RBDigital Audio Books
  - -Cloud Library (3M)
  - -Safari
  - -Lynda.com

Indexing Safeguards (avoiding a bad day for you)

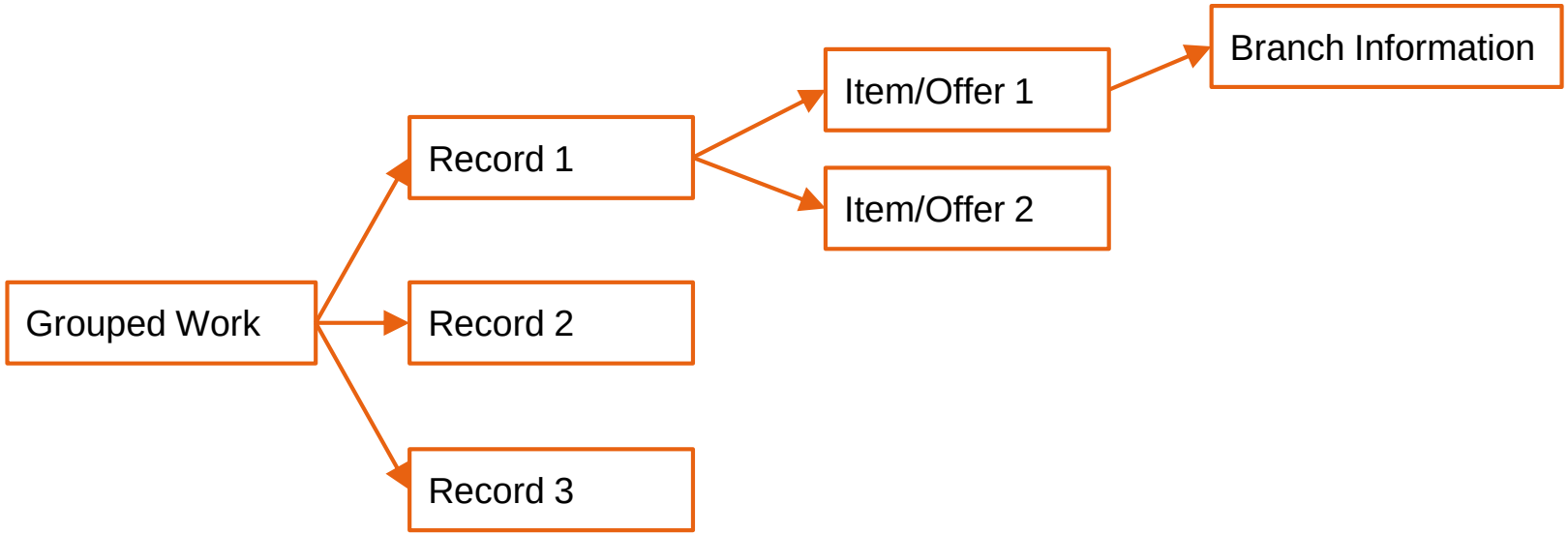
Avoid indexing during export mishaps

➔ Incomplete or missing exports

Recovery from corrupted indexing

➔ Easy restoration of index backup

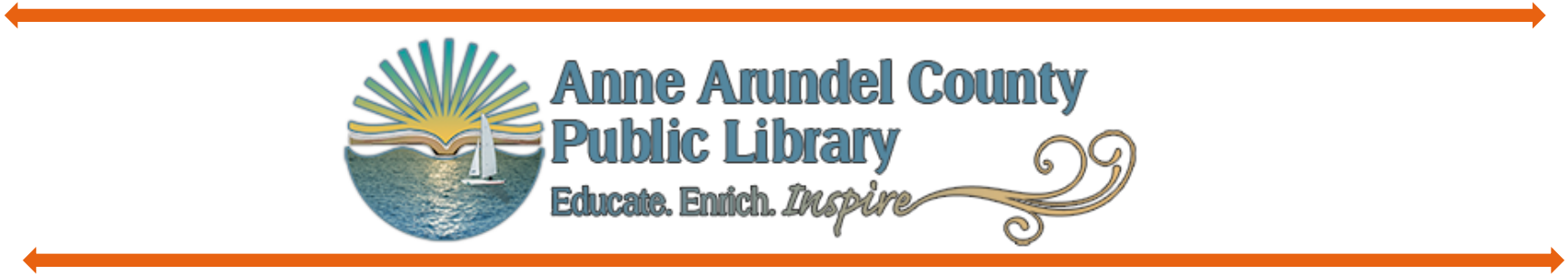
Linked Data



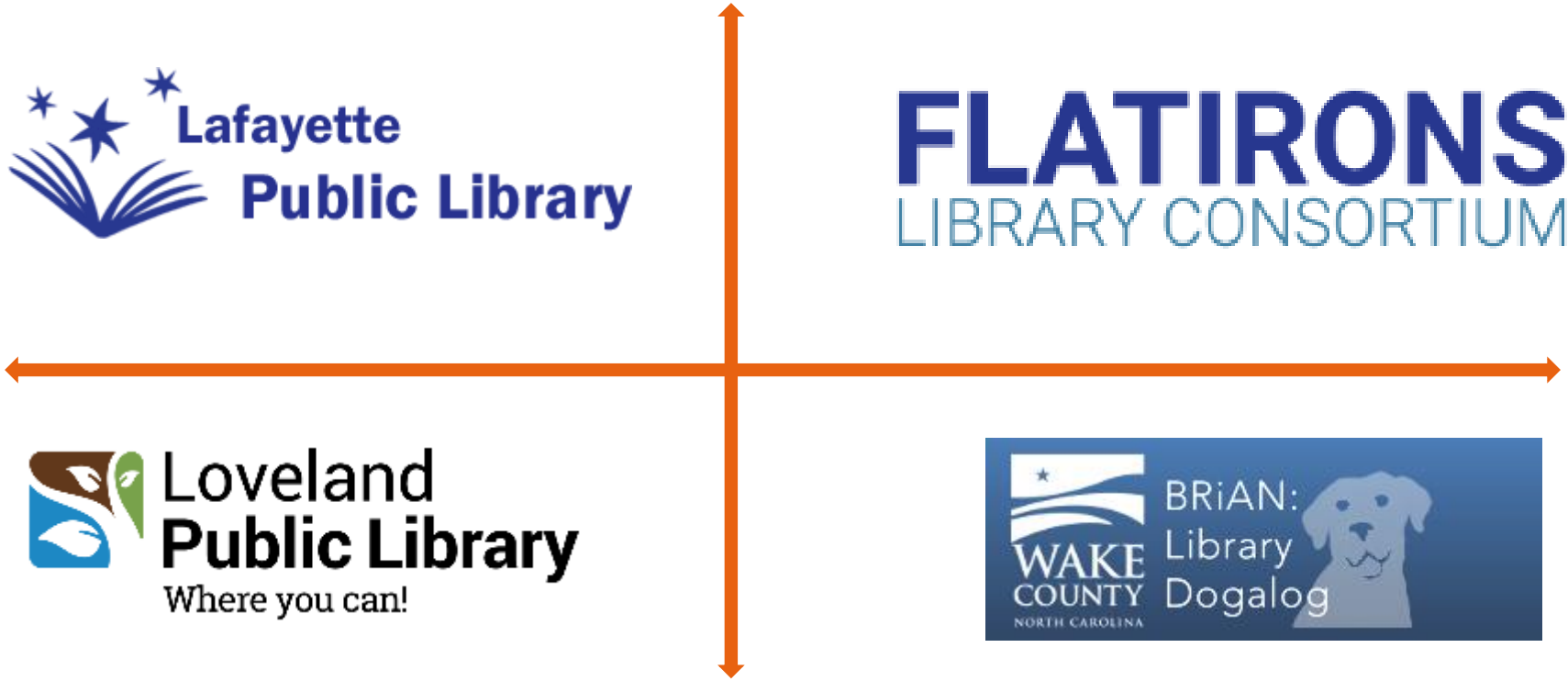
Information about the title presented in a way that is easy for search engines to read

News From Beyond Marmot

Discovery Partner Implementations



Discovery Partner Special Projects



Need for Greater Organization

- ➔Optimism/Overcommitment
- ➔Choosing projects with deadlines over ongoing work
- ➔Burnout/Growing backlog
- ➔Need for greater organization (highlighting transparency)

Realigned Responsibilities

➔Looked to successful software teams (SCRUM)

➔Looked at models for flatter teams (Reinventing Organizations)

➔New Roles

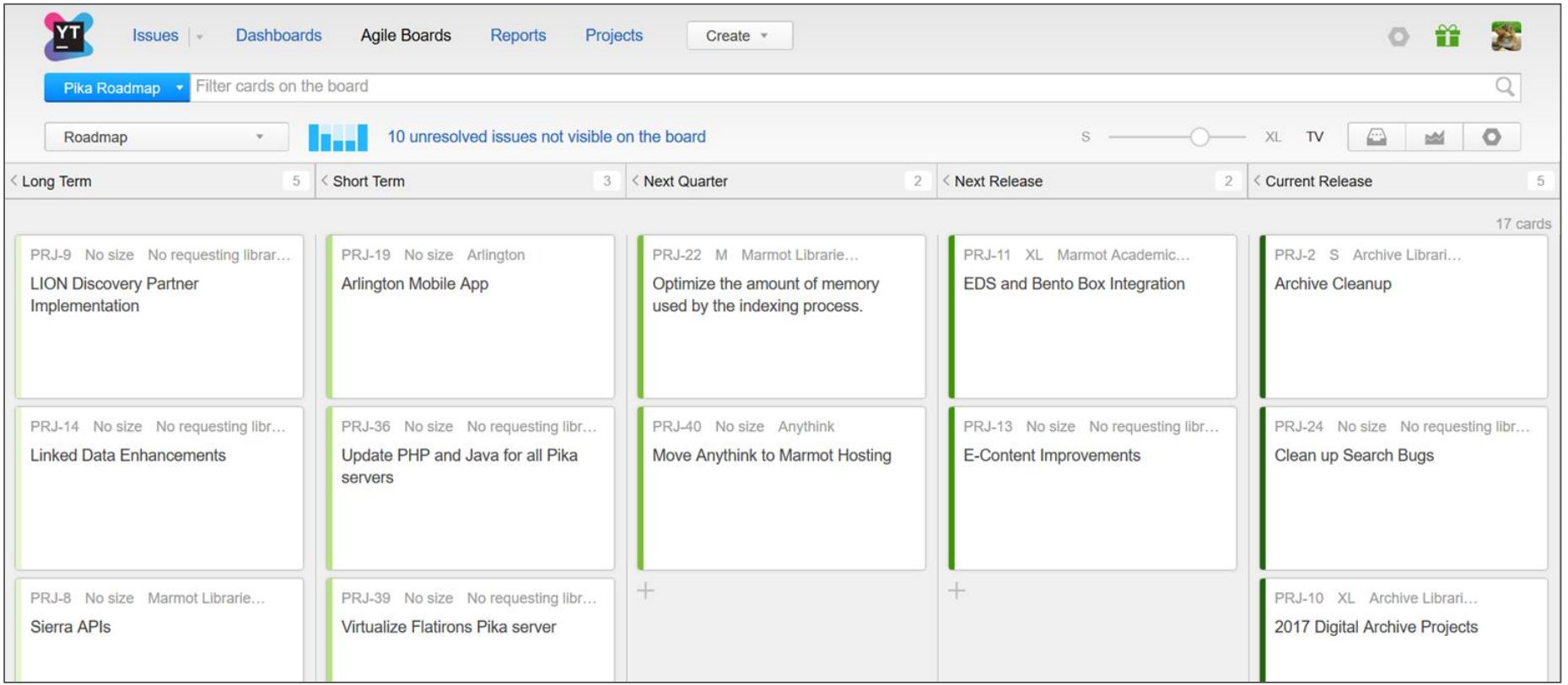
-Mark as Scrum Master Senior Programmer

-Pascal as Programmer

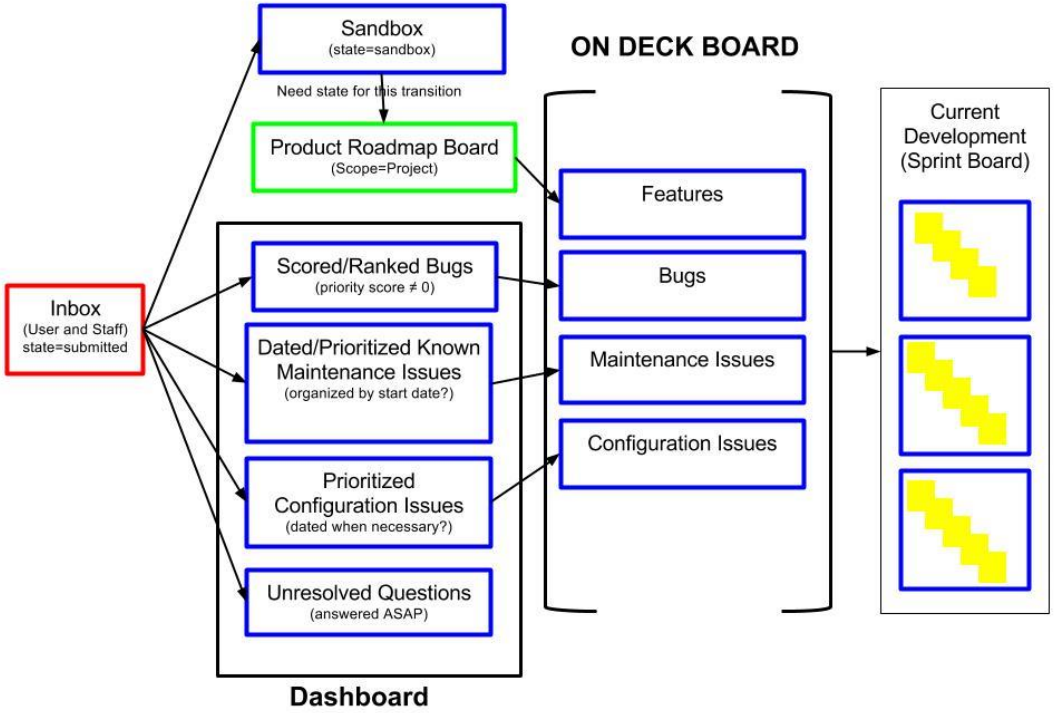
-Jordan as Product Owner

-Tammy's Awesomeness

Flexible Roadmap



New Workflow



Note: Different rectangles signify different YouTrack project types with different fields.

Thank You!

Search Enhancements