R&D Updates MUG 2017

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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

![Advanced Search Interface](image-url)
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
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.

My Materials Requests

You have used 1 of your 150 yearly materials requests. We also limit patrons to 10 active requests at a time. You currently have 0 active requests.
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 assigned 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
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
Information about the title presented in a way that is easy for search engines to read
News From Beyond Marmot
Discovery Partner Implementations

Santa Fe Public Library
Community Services Department, City of Santa Fe, New Mexico

Anne Arundel County Public Library
Educate. Enrich. Inspire

Nashville Public Library

Metro Nashville Public Schools
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