PINES Projects: Summer 2015-Spring 2016

# **Cloned Patron Addresses**

***Completed June 2015***

Project Lead: Chris Sharp

Evergreen has a "clone user" facility that allows you to create a copy of the account's address information to be used when registering a new user with the same address.  This prevents data re-entry and saves staff time.  However, we get continual reports from circulation staff not being able to delete user addresses because they are referred to by another patron account.  Sometime in 2.3 or 2.5, Evergreen added a setting so that cloned patrons get a \*copy\* of the same address rather than a hard database foreign-key link to the original address.  This has solved the problems for accounts created since that setting was activated, but there are still 231,376 users who have addresses that don't "belong" to them.  We would like to have EDN staff devise a way to create copies of addresses for these users so that we can avoid this problem in the future.

# B4 Online Reading Logs

***Completed July 2015***

Project Lead: Terran McCanna

The web component of the overall “1000 Books B4 Kindergarten” was rolled out in April 2015, with the complete Spanish-language version of the site rolled out in July 2015. The site provides parents and other caregivers with an easy-to-use, online tool to track their children’s reading from any web browser or web-enabled phone or mobile-device. The site is available for all of Georgia’s library patrons regardless of which library system or consortium they are a member of. The PINES KPAC has direct links from the item records to add books to reading logs, and non-PINES libraries can add this functionality to their catalogs as well if they wish to do so.

# PINES Help Desk

***Rollout Date: Tuesday, September 8, 2015***

Project Leads: Dawn Dale, Terran McCanna

GPLS has transitioned from the previous help desk software (FootPrints) to an open-source help desk software package (osTicket).

Benefits:

* Streamlined, more user-friendly interface.
* Users will be able to send emails to the new software to open a new ticket (help@help.georgialibraries.org).
* Significant cost savings to GPLS.
* The GPLS Help Desk Manager will have more control and flexibility over how the system works, and can customize many aspects of it.

Rollout Details:

* Everyone who uses the help desk will need to set up new user accounts (138 users from 52 library systems have already done so).
* For library staff: Please note that if you did not have a help desk account in the old system, you should double-check with your library management that it is alright with them if you have a help desk account. Some library systems prefer to have just a few designated help desk contacts.
* If you need to review one of your old tickets after the switch, we will be able to get it from the archives for you.

# PINES Quick Reports

***Rollout Date: Monday, September 14, 2015***

Project Leads: Elaine Hardy, Dawn Dale, Chris Sharp, Terran McCanna

Project Team: Reports Working Group; Cristina Trotter, George Tuttle, Tina Jordan, Dixie Henning, Priscilla Lewis, Jennifer Durham, Laurie Eubanks

Project Instigator: Elizabeth McKinney

PINES contracted with Emerald Data Networks to develop a more user-friendly interface to the complicated Evergreen reporting system. This simplified and streamlined interface has been dubbed “PINES Quick Reports” and was officially made available on Monday, September 14, 2015.

PINES Quick Reports is designed with the infrequent user in mind, for example the branch manager or director who does not do reports on a regular basis, but who occasionally has the need to get a recent circulation count or a list of items marked ‘claims returned.’ The interface is web-based and accessible through any current web browser, and relies on the same user permissions structure that the existing system has (anyone who currently has the permissions to run reports will be able to run reports in the new system with the same login).

After logging in, choose from a brief, carefully selected list of report templates, fill out a short form, and submit the report to be run. You have the option to receive an email when the report is completed, or to see a list of all the reports that you are currently running or that have completed.

The PINES Quick Reports interface eliminates the need to set up your own folders, the need to search through long lists and folders containing dozens or hundreds of possible templates, and the need to clone the report templates you wish to save for future use.

Advanced reports users who wish to create their own custom reports or access the other lesser-used shared templates will still have the ability to do so through the existing Evergreen Reports interface.

Rollout details:

* There was not any down-time associated with this rollout.
* A direct link has been added to the Evergreen Staff Client’s home page.

# PINES Library Locator Map

***Rollout Date: Monday, September 14, 2015***

Project Lead: Terran McCanna

PINES staff worked with Emerald Data Networks to develop a new, interactive library branch locator map. People accessing the map will type in their starting point (address, city, or zip code) and the map will display the nearest libraries.

Clicking on a library marker on this map displays the library system, branch name, and street address, and offers links to the library hours and contact information (in the online catalog), to get directions to that location (using Google Maps), and to search the PINES catalog (with that branch selected in the “Search within” dropdown box).

Rollout details:

* There was not any down-time associated with this rollout.
* The “Library Locations” menu link in the PINES OPAC, the “Find a PINES Library” map on the OPAC’s basic search screen, and the “Find a PINES Library” map on the PINES documentation were updated to point to the new page.
* The existing PINES library directory (<http://georgialibraries.org/directories/pineslibdir.php>) is still available.
* Any inaccuracies in the map or library contact information and hours should be reported through the Help Desk.

# PINES Testing and Upgrade

***Testing Period: November-December 2015***

***Upgrade: January 2016***

Project Leads: Chris Sharp, Terran McCanna

The next Evergreen software upgrade for PINES will occur over the Martin Luther King, Jr. holiday weekend in January, 2016. The PINES staff are currently preparing the test environment and planning the testing process. We will send out a call for testers from the libraries within the next few weeks.

# Acquisitions Shakedown Cruise

***In Process***

Project Lead: Elaine Hardy

Three libraries are participating in the Acquisitions Shakedown Cruise to iron out workflows and general implementation. They are Chestatee Regional Library System, Henry County Library System, and West Georgia Regional Library System. Chestatee has completed testing on the acquisitions server and has moved to the live server for ordering. Henry and West Georgia are still testing and will be moving to the live server in the coming weeks.

# Web Client

***In progress: Preview of Circulation Module coming soon!***

Project Leads: Terran McCanna, Chris Sharp

The PINES staff is currently evaluating the Circulation module of the upcoming web-based staff client in order to determine whether it may be feasible to make it available on a trial basis as of the next upgrade. The core developers at Equinox Software have completed the majority of the development for the second phase (Cataloging) and it is currently undergoing testing by the Evergreen community. The third phase (Local Administration and Reports) is in the beginning stages. See also Upgrade and Testing.

# Spine and Spine/Pocket Label Printing

***In progress: Possible inclusion in January 2016 upgrade***

Project Lead: Elaine Hardy

Currently, spine and spine/pocket label printing directly from Evergreen is problematic due to XulRunner limitations. We would like to see a web-based solution to printing these labels similar to the label converter at <https://www.branchdistrictlibrary.org/professional/labels/>  A new converter would allow for the use of different (specific) label stock that could be utilized with laser or deskjet computers, Zebra printers and Dymo LabelWriter printers. For sheet label stock, users could print either an entire sheet or a partial sheet. Specific stock or the specifications for the stock would be provided.

# Search by ISBN from Mobile Devices

***In progress: Possible inclusion in January 2016 upgrade***

Project Lead: Terran McCanna

Add a “Scan Barcode” button to the OPAC’s search screens (which will display on current mobile devices only) to launch a barcode/QR code scanner when clicked. The scanner should recognize common barcode and QR code formats on books to get the book’s ISBN, then return to the OPAC to launch an ISBN search using Evergreen’s native search function.

# Library Predictive Selector

***In progress: Possible inclusion in January 2016 upgrade***

Project Lead: Terran McCanna

The list of libraries in the PINES consortium dropdown list is so long that it can be time-consuming to scroll through them to select the library that you are looking for when using the PINES OPAC, particularly if you are not sure which regional library system a branch belongs to. Improvements are being made to this list to allow patrons (and staff) to begin typing the name of the library they wish to select. The dropdown box will respond dynamically with a list of libraries that match the letters typed in. (For example, typing "fay" will narrow the list of options to "LaFayette-Walker County Library" and "Fayette County Public Library.)

# Debian Packaging

***Development will begin soon***

Project Lead: Chris Sharp

Andy Witter and Josh Lamos of Emerald Data Networks worked in 2011/2012 to create Debian packages for OpenSRF and Evergreen and their unpackaged dependencies.  I would like to see us revise that process to bring it more in line with Debian packaging standards with a dual goal in mind: 1) create a set of portable and well-documented tools for our build process to create an opportunity for further buy-in in the Evergreen community for our process, and 2) create packages for Evergreen, OpenSRF, and their dependencies that could then be submitted for acceptance by the Debian (and/or Ubuntu) project(s).  This would increase Evergreen's profile in the free/open source software world and would potentially increase adoption by easing the installation process.  Ongoing work I've done on the portable version of the deb-builder is available here: <http://git.evergreen-ils.org/?p=contrib/pines/eg-debian.git;a=summary>.

# PINES Website - WordPress Migration

***Development will begin soon***

Project Lead: Terran McCanna

GPLS plans to move all supported sites to WordPress, including the PINES web site. All of the site content will be transitioned, and the site structure will remain the same (although the link structure may change due to technical considerations).

# Mark Item Discard/Weed

***Requirements Writing in process***

Project Leads: Elaine Hardy, Dawn Dale, Chris Sharp, Terran McCanna

To provide the ability for circulation staff with the appropriate permissions to directly mark an item discard/weed similar to the process to mark an item missing or lost, Mark Item Discard/Weed will be placed in each dropdown menu where staff currently Mark Item Damaged and Mark Item Missing.

# Mark Damaged (by Patron):

***Requirements Writing in process***

Project Leads: Elaine Hardy, Dawn Dale, Chris Sharp, Terran McCanna

When a returned item is damaged, while the item is still checked out to a patron, staff will be able to Mark Damaged (by Patron) within the patron record under the Items Out tab, dropdown menu: Actions for Selected Items; in the same location as Mark Lost (by Patron). Staff would mark the item damaged and be given option of no charge, option to charge a library-determined dollar amount, or full item price and processing fee.

# Online Credit Card Payment

***To be discussed at September 16th PINES Executive Committee Meeting***

Project Lead: Dawn Dale

During the last several months Dawn has investigated e-commerce payment solutions that will interface with Evergreen. At this time there are three options: PayPal, Stripe, and Authorize.net. Dawn spoke with other Evergreen libraries that have used PayPal and Authorize.net, all of which are pleased with the way the system works. The PINES Team has also tested Stripe in the PINES test environment, and it appears to run smoothly as well. The end goal is to allow libraries to accept credit card payments online via the OPAC, having those payments automatically apply to the correct accounts and bills in Evergreen, and depositing the funds directly in the patron's home library's bank account. Each library system that chooses to participate will be able to select which of the three vendors to work with (libraries may also choose not to participate). There are many things to discuss and decisions to be made by the Executive Committee before this project can move forward.

# Online Patron Registration and Renewal

***Feasibility and cost analysis in process***

Project Leads: Elizabeth McKinney, Elaine Hardy

Currently patron registrations and account renewals are staff-mitigated. PINES is investigating the use of online address and identity verification procedures to ensure the accuracy of patron entered information and to take the place of physical proof of name and address documents that are currently required to be shown at a library in order to successfully register for or renew a patron account.

# Catalogers’ Conference

***In planning stage***

Project Lead: Elaine Hardy

Still in the early planning stages, the next Catalogers’ Conference will be in Late January or early February 2016. We will have sessions on linked data and the Bibliographic Framework (the coming replacement for MARC) as well as a CatFest dealing with database maintenance, cleanup projects, and original cataloging. We are also considering brief sessions on call number and subject heading assignment.