

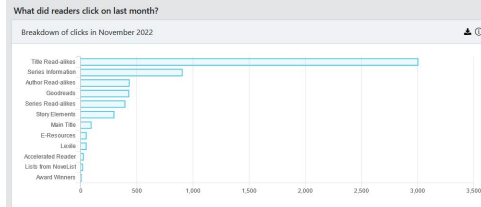


## Staff Report

December 2022

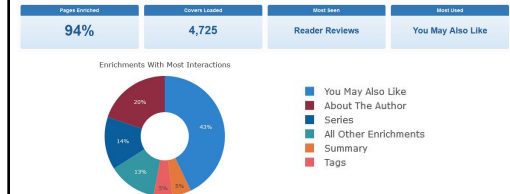
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## NoveList Added Content Categories



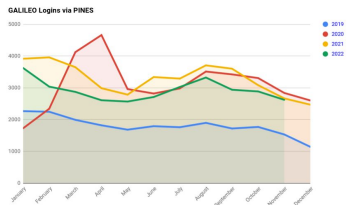
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## Syndetics Unbound Added Content



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## GALILEO Click-Throughs from PINES



- Most Used:
- Mango Languages
  - NoveList Plus
  - Gale Legal Forms
  - Images (EBSCO)
  - eBooks (EBSCO)
  - LearningExpress

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## PINES App

**Android:**  
2.9K new installs

**iOS:**  
7.8K new installs

(Sept-Nov 2022)



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## Ecard Registrations

**Online library card registrations January-November 2022:**

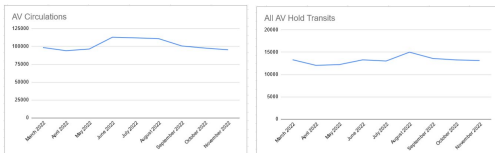
- Total: 20,253
- Updated to Full Accounts: 2,789 (12%)

**Estimated staff time savings at 5 minutes per registration:**

- 1,688 hours

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## AV Sharing



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## AV Sharing

- **Estimated Average 17,768 Hold Transits (including returns) Between Systems / Month**

- Average 91,814 Circulations / Month
- Average 30,508 Transits / Month
- Average 11,895 Hold Transits / Month
- Average 8,884 Hold Transits Between Systems / Month

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## PINES Learning Center

### Total Usage

- 1181 total users enrolled
- 2931 courses enrolled
- 1865 courses completed
- 688.5 CEUs earned

<https://my.nicheacademy.com/pines>

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## PINES Learning Center

Most popular courses (January-November 2022)

1. Using the PINES Catalog (combined public & staff)
2. PINES Local Admin Certification
3. Basic Reports
4. Patron Registration
5. Borrowing Procedures
6. PINES CatCoord Certification (New Course)
7. Permission Group / Profiles
8. Patron Search
9. Correcting Negative Bills (New Course)
10. Advanced Reports

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## Evergreen Development Update

- **Evergreen Conference: June 2022**
- **Bug Squashing Week: July 2022**
- **Feedback Fest: September 2022**
- **Evergreen Hack-A-Way: October 2022**
- **Bug Squashing Week: November 2022**

### PINES Involvement:

- Dawn Dale, Elaine Hardy, Tiffany Little, Terran McCanna, Susan Morrison, and Chris Sharp contributed code, testing, or documentation.
- Terran McCanna was also on the Release Team for Evergreen 3.10
- Shula Link from GCHRL also participated

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## 2023 Evergreen International Conference

Registration Opening Soon!

April 26-29, 2023

Worcester, Massachusetts

<https://evergreen-ils.org/conference/2023-evergreen-international-conference/>

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# PINES

Thank you!

Any questions?

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# PINES

January Upgrade!

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## Upgrade Schedule

Testing Period: Now through January 6

January 6: Director Sign-Off Sheets due

January 14 at 6pm: All services go offline

January 17 at 6am: All services will be back online

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## Changes

- **Interface Updates**

- Daily Cash Reports, Patrons with Negative Balances, Library Settings Editor, Acquisitions

- **Hours of Operation**

- Add notes to appear in OPAC (for example, if the branch closes from 12-1 each Monday)
- Submit Help Desk ticket with your changes

- **Renewal from Due Date**

- Current setting on test server is effective after 11 days, investigating options for various circ mods

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## Changes

- **Test Notifications from OPAC**

- Patrons will be able to check whether or not they can receive email and SMS text notifications by clicking new buttons in My Account

- **Patron balance owed**

- Now available as a column in user buckets - useful for monitoring accounts that are in payment plans or collections

- **OPAC-Visible Stat Cats**

- Now OPAC-visible again!

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## Possible Features

### Currently Testing for Feasibility:

- **Custom Cover Image Uploader**

- For items without cover images, such as local resources

- **Custom Staff Portal Pages**

- To allow Local Admins to add additional links to the staff client staff page for their system

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## Automated Notices

Formatting automated notices with HTML should be possible after the upgrade to Evergreen 3.10.

A working group will be created after the upgrade to review options.

## Online Library Card Renewal

The development is nearly complete that will allow patrons to renew their own library accounts through the OPAC if they meet certain criteria:

- Account expiration date will be no more than 30 days in the future
- Account is still active (ie, has been used in the past 3 years)
- No fines are owed
- No blocks are on account

## Online Library Card Renewal

- **Account is not barred**
- **Account has not been flagged with an invalid address or phone number**
- **The patron has an allowed permission group:**
  - Patron
  - Friend
  - GLS
  - Homebound
  - Trustee
  - Quipu

## Online Library Card Renewal

### Address Changes

- If the patron meets all other qualifications, but their address changes, the patron will only be eligible for one 30-day temporary renewal
- This will give the patron time to visit the library with proof of address for their full renewal
- Staff will only need to check the proof of address and update the expiration date.
- (Homebound and GLS patrons are exempt from this.)

# PINES

## Questions?