

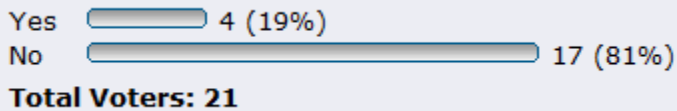


Executive Committee Meeting Action Items for December 3, 2013

1. Option for desk renewal to use original circulating library

A new global flag option has been added to allow the circulating library of a desk renewal (aka a renewal using the staff client) to reuse the original circulation library for circ rule behaviors rather than using the workstation. This new setting is similar to existing options to use the originating circulation library in OPAC renewals.

Question: Should desk renewals use the original circulating library?



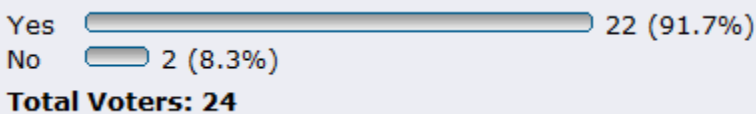
Comments:

- Sometimes it is helpful to know if and where a patron has renewed an item.
- I have really found it helpful to know both the Circulating and Renewal libraries, and I would not be for this change if it would mean not being able to get that, as many times the circulating and renewal libraries are different.
- Shouldn't the library that purchased the book always get credit for every check-out of that book? I agree that it would be incredibly helpful to still see where the item was renewed (to help in tracking down books and any other questions related to the transit of an item) but I feel that the owning library has a right to all checkout credit of a book they purchased (to help with circ statistics in terms of justifying their materials budgets) Does that make sense?
- From what I understand this would only affect circ rule behavior and not the location listed as to where the item has been renewed. I'm fairly certain a previous version of Evergreen had this in place because items from other libraries used to use originating circ rules whereas currently it uses circ rules of the renewal workstation. Patrons who are accustomed to renewing a dvd for two weeks in our system now only get one week when they renew with us.

2. Option to disallow use of a branch as a pickup library for holds

A new library setting is available to remove a branch from consideration as a hold pickup library. This setting only affects the OPAC pickup library selector and does not otherwise affect the display of the branch in the OPAC. It also has no effect on hold targeting / capturing.

Question: Should it be an option to stop a branch from being a hold pickup location?



Comments:

- This option would be helpful to ARLS since we have 3 resource centers that are reference collections only and are not staffed. It would be good to block them as a pickup library.

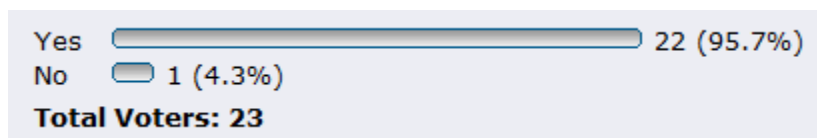
3. Floating groups

A floating collection is a group of items that are not housed permanently at one specific library, but instead are shelved in the library where they were most recently discharged. When a floating item is sent to a library within a defined group of libraries, it will remain at that location after being returned by the borrower, saving the time and cost of returning it to the original library.

With this version of Evergreen, the floating groups functionality has been enhanced with more finite ability to define where a copy will float by defining limited floating groups and assigning individual copies to them.

At present, no PINES libraries use floating collections. If approved, this would be an optional setting on a system by system basis, it would not be PINES-wide. It would also require extensive testing by a volunteer library system to ensure that the functionality works as expected.

Question: Should each library system have the option to allow designated items to float within their system?



Comments:

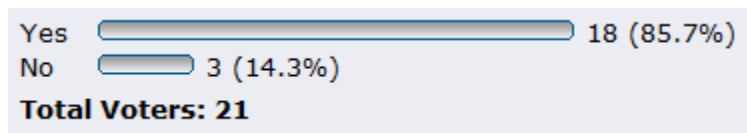
- I like the idea of a floating collection. I agree that it should be a local option, and I agree that it needs testing and some other policies --such as holds and returns.
- As long as this is decided by the local system, I am in favor of it.
- I like the idea of a floating collection. I agree that it should be a local option, and I agree that it needs testing and some other policies --such as holds and returns.
- I am in favor of testing and trial implementation taking place before we vote.

4. Holds – Behind desk pickup

Most PINES libraries store all holds behind their desks, but a few libraries put their holds in a public area. At the September 2013 Executive Committee meeting, the option to allow libraries that put their holds in a public area to be able to mark all holds for certain patrons to be stored behind the desk was discussed, but tabled.

Now, with version 2.5, the functionality has been enhanced to allow individual holds to be marked as 'Behind Desk Pickup'. This per-hold setting could be set by staff or by the patron.

Question: Should the option to mark holds as stored behind desk be enabled?



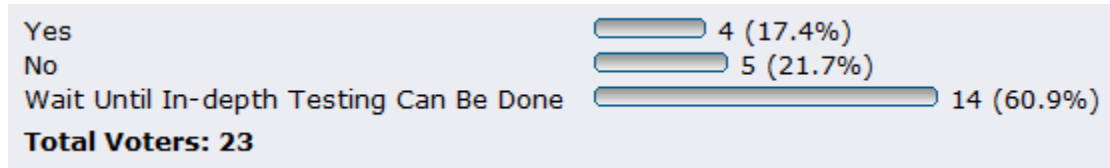
Comments:

- This would be a helpful feature to those libraries that like to offer self-serve holds.

5. Patron blocking for too many lost items

This will add a group penalty threshold that will alert staff when a patron has too many lost items. If you vote for this to be enabled, how many items would you suggest the number of items be set at?

Question: Should blocks be automatically put on patrons with over a certain number of lost items?



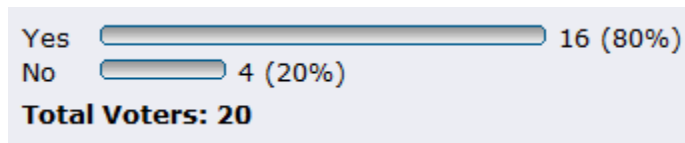
Comments:

- Is this an accumulated number of lost items that over time may have been paid for or an overall number at one time?
- There seem to be so many unanswered questions about how this would work that I would only support its implementation after testing is done.

6. Include lost items as items out

Through a new library setting, Include Lost circulations in lump sum tallies in Patron Display, the staff have the ability to determine if lost items will be included in items out. Under the current process, lost items that have not been paid for are already considered items out, so answering “Yes” will not change the current behavior.

Question: Should lost items be considered as items out?



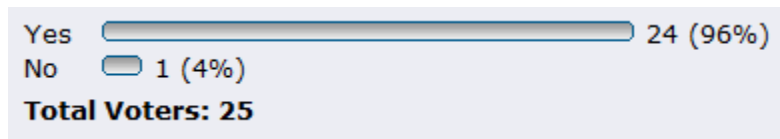
Comments:

- 'Lost' items should be viewable the same way they are currently viewable on the patron account but I do not think 'lost' items should be in the count of items actively marked as 'checked out' when looking at the numbers.

7. Warn when patron account is about to expire

A new setting can display an alert in the staff client if a patron account is about to expire. If you vote to enable this alert, how far in advance of the expiration date should the warning appear?

Question: Should a warning on a patron account appear if the account is about to expire?



Comments:

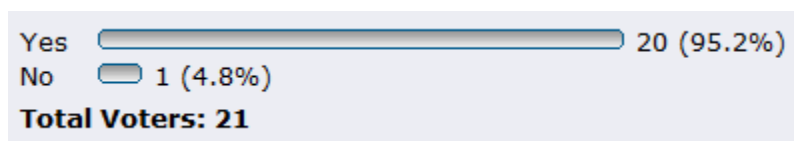
- This would be a very helpful feature! At some point in the past, we had an alert like this (it may have been when we were on Unicorn.) A good time interval, I think, is 30 days.
- 30 days would be good. It was a wonderful feature in the past.
- 30 days seems reasonable.
- I completely agree with some sort of warning prior to the expiration date. I often answer questions from patrons regarding GADD issues. Whenever their PINES account expires, they can't check out GADD items and always contact the library. This would help immensely.
- Great idea but I'd say 2 weeks, which is the same time period for most checkouts & renewals. 30 days seems too far out. Consider: every time you need to go into a patron's account (edit, fines, etc), that alert is going to pop up and will do so for 30 days. If it's like the other alerts, you'll have to keep clicking it off every time.
- I agree with 30 days. The idea that the note pops up every time staff goes into the patron record and thus becomes annoying is good because if it is annoying enough the staff will notice it.
- I agree with a 30 day alert attachment to the patron account in the staff client. If an additional alert is ever added into the patron client then it would be reasonable for *that* alert to appear two weeks prior to account expiration. The 30 day alert would a standard alert. Just like all our other standard alerts. We are expected to read all alerts and notes in the account. And even if the alert on the patron side is 30 days it is a patron's responsibility to maintain his/her account and keep it in good standing. I'm going to just unprofessionally say 'so what' if a patron has the annoyance of clicking away from this alert every time s/he enters his/her account. S/he needs to get up and come to the library and update it. In many cases at the least the phone has changed and the patron has not had the courtesy to update it with the local library system. In our system we fully update the account any time something has to be updated or a card is replaced. We do our best to stay on top of this but there are more patrons than library staff. It is time that patrons take a bit more accountability for their accounts.

8. Address alerts

There is a new option for libraries to configure certain street addresses to generate an alert in the staff client when a patron registers for a new card with one of those addresses. An example of this might be the address of a shelter, a halfway house, or another type of non-permanent residence.

This was a feature that was specifically developed for a non-PINES library system, and it may or may not be relevant to PINES libraries. If it were enabled, any system that wished to use it would be required to input and maintain its own list of addresses.

Question: Should the option to maintain a list of addresses that generate alerts be enabled?



Comments:

- This would be relevant to PINES. An even better feature would be for the Evergreen Staff client to be able to cross reference addresses USPS to ensure correct addresses AND to search for duplicate addresses that may be typed in different variations of that address. But just enabling addresses that would cause alerts would be sufficient.
- Another use for this type of alert would be for addresses that are apartment complexes, trailer parks, campgrounds, etc. Many people do not put the complete address, such as the apartment number and the mail isn't delivered.

9. Patron self-registration

There is a new feature to allow patrons to fill out a web-based form to begin the account registration process. The patron would fill out basic information (name, address, phone number, email, home library), and submit it. The patron would then need to go into the library to complete the registration process.

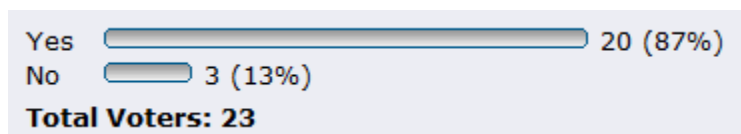
When the patron arrives, the library staff would then look up the patron on a list of pending users, confirm proof of identity and address, assign the library card number, double-check to be sure the patron does not already have a card, etc.

Pending patron accounts which sit unattended in the database for too long are purged via a regularly running (CRON) script.

Some things to consider:

- 1) Would it save staff time?
- 2) Would it save patron time?
- 3) Would it be a good PR move regardless of whether or not it saved a significant amount of time?
- 4) If it were enabled, how should patron signature be captured?
- 5) If it were enabled, how long should a pending patron account be left before being purged?

Question: Should patron self-registration be enabled?



Comments:

- 1) Yes, this feature has the potential to save staff members time. This will save time if the staff client form is automatically filled out for the staff member instead of having to retype the information from one form to another.
- 2) Yes, this feature has the potential to save patrons time. The patron can fill out on the go and come in to the library for confirmation.
- 3) This can definitely be a good PR move. It has the potential to save time. It speaks to the currently up and coming of age patrons who exist in a web-based world already. It has the potential to become a paperless system. If accessible via a phone app then it would in time become even more popular.
- 4) Patron signature should be captured via electronic signature pad at the library OR non-electronic signature on print out of completed form but it would be best to move over to an electronic signature pad system.
- 5) A 'pending' account should be held for not shorter than 48 hours and not longer than 7 days.
- YES! Great time saver for staff. potential to save patron wait time while we assign the card. added patron responsibility for the information they provide. we might even consider dedicating an in-house

machine for ALL patron registration. Not sure about PR benefits but it moves us forward with what patrons expect for web-based services. Would be ideal if there was a print confirmation at the end of the registration process that the patron could print and bring into the library, they could then sign the confirmation for signature capture. Eventually, electronic signature would be great. 48 hours and no more than 7 days seems reasonable for pending purge.

- Will this feature identify the record as self registration?
- I agree that it will be a time saver. I think the ability to capture an electronic signature with the option to get a print signature is great. And purging pending applications after 7 days is also good. I'm assuming that for records retention purposes, after the patron comes to the library to finalize the transaction, the library is responsible to print or scan the application in order to keep it the requisite amount of time. Wouldn't it be nice if a finalized application form along with its electronic signature could be stored in the patron's Evergreen account. Then we could easily pull up the signed application when the patron forgets they filled out an application, or if they say they were unaware of Georgia Code OCGA 20-5-53 about accepting financial responsibility for fines and/or damages to library materials.
- Right now, the system will not store an electronic signature. The Executive Committee would need to decide on a standard method of collecting the applications with signatures so that the print versions could be stored following the standard document retention policies.
- I think this is a good idea. People are expecting us to be able to do things like this. I think if we are going to do this, we need to go all the way and store all patron applications (with electronic signatures) in the patron record. Whether it's done in person or the process is started by the patron at home, the application and signature should be stored in the record. There are a lot of patrons who want to argue about whether or not they have applied for a card; it would be nice to be able to show them this information. Although, to be honest, it won't stop the arguing from the truly disgruntled, just from the mildly confused.
- Storing an electronic signature is an interesting topic, and one that might be considered for some future development. This version, however, does not add any additional fields to the actual registration form / patron account info, and even if it were developed at some point, we would still be required to follow the state's official record retention policy. This is not a policy that the PINES Executive Committee can change, it is a policy defined by the USO / Board of Regents.]
- Since this does not contain things discussed (such as an electronic signature) Unless there is a way for the system to verify information and obtain a signature I really don't think this would save staff members that much time. The staff member would still have to verify all of the information and search to see if the person had another card (which they might not catch if that person self registered under a new married name, etc.) At the current level of technology I think that this might cause more problems and time expenditure for staff. When things are developed so that signatures can be captured/records can be cross referenced and verified somewhat accurately, I think self registration would be great. For now, a no for me, but I am definitely open to revisiting it in the future.
- Good idea. I too would strongly support the ability to store a patron signature digitally in the record. I guess IT people would have to figure out how to do that, but it sure would be great. Our Circulation folks are continually having to "prove" someone signed to have a card by finding the old registration card, and keeping them on file is extremely time-consuming AND space-consuming!
- Electronic signatures aside, Any shift-F1 (create new account) screen can be printed off and then physically signed by the patron. There are methods for storing virtual copies of these forms, some as easy as scan and save the document. Filling the form out online does not have to be a required thing but for the upcoming youth in our libraries who are accustomed to online forms and sign-ups we need to evolve to keep up with them (not to necessarily meet their needs/wants but just to keep up). This option can be used more as a convenience. An online application is not lost as easily as a paper application handed to a child or parent.

This feature would need to be adapted with the patron in mind. We must assume that they are not going to know what library system/branch they need to sign up for or similar things. I don't think we need to get into the 'what-ifs' but just give this opportunity a go.

- Those are good points, but I don't think introducing technology for technology's sake -to keep up- without evaluating its actual usefulness and effectiveness is the best plan. Could we have a couple of libraries who are interested try this out and see what their experiences are before voting a yes or no across the board?

-this would also have the benefit of suggestions to adapt the self registration process to help users -as you mentioned.

Additional feedback from circulation staff members who volunteered to participate in the upgrade testing:

We want more fields for additional contact information such as e-mail and phone number. Concerned that patrons will not be able to figure out where their local library is inside the region-based layout. Do patrons have to still fill out a paper contract so that they have something to sign? What about proof of address? What about patrons who already have an account? Circulation staff at this branch have a lot of reservations about the usability and viability of this offering.

10. Proposed new circ modifier: Musical instruments

A library has requested a new circulation modifier. They are planning on circulating ukuleles. Their proposal is:

Circ modifier -- Musical Instruments

Recurring fine (default) -- \$3.00

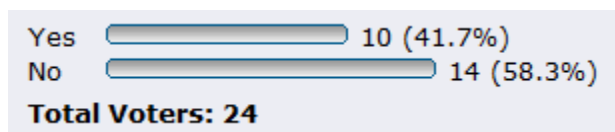
Normal duration -- 14 days

Renewal count -- 2

Holds -- within system only (similar to equipment holds -- do not transit outside of owning system)

Please vote on the inclusion of the circ. modifier and discuss the circ. modifier as well as any differences in fines and checkout time (should fines and duration be modeled after equipment?).

Question: Should PINES add the circ modifier Musical Instruments



Comments:

- I would think that musical instruments would currently fall under the circ modifier: equipment. It would not be necessary to have a circ modifier: musical instruments unless more libraries had the need for said circ modifier.
- I say no, no, and NO. We have just spent time cleaning up the circ modifiers. Let's not muddy the waters again. It would seem as if either equipment or realia would cover ukuleles.
- I think PINES has to continue to evolve to meet user needs. If the library system in question needs this, we should be accommodating and set up a generic category such as Musical Instruments.
- Lots of circ modifiers does muddy the waters.
- The equipment modifier will only allow for 7 day circ with no renewals so it is not a good alternative for musical instruments which is a 14 day circ with the possibility of 2 renewals. We need to allow additional circ modifiers if there is not a good alternative in the existing ones. To say we will not have

more circ modifiers because we have many currently is not a solid argument for voting no. If a library has a need for an additional modifier we owe it to that library to consider the request based on if the proposed modifier provides a new type of modifier that allows for something unique and currently not available.

- If the equipment modifier only allows for 7 days and with no renewals, then it would not work for our needs. We want to circulate musical instruments which is a 14 day circulation. We would also want the option for 2 renewals.
- While I have no trouble with adding a new modifier, we have just cut the list considerably. Would it be possible to have something on the order of Equipment and Equipment-Long (similar to the videos, DVDs etc.) so that if someone wanted to add other types of items it could be more easily accomodated without adding to the list?

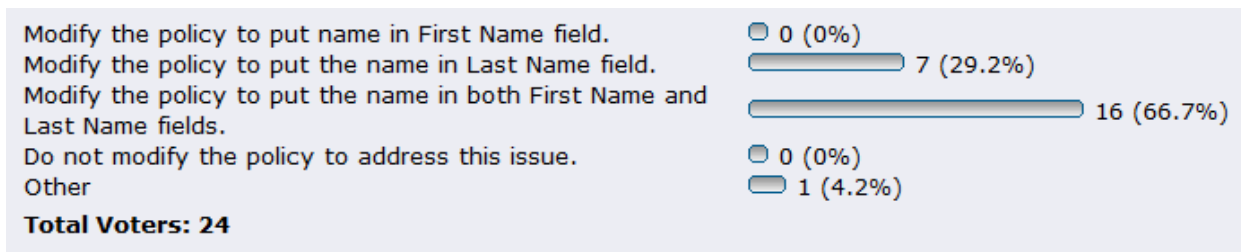
11. Procedure for one-word names

One of the PINES libraries encountered a situation where a patron came in to register but had a one word name (no separate first and last name). Current PINES policy does not address how to enter the name in the registration form so that it can be easily looked up later. GA driver's licenses require a first and last name and use the same name twice if necessary (ex: for Prince – they enter Prince Prince) or for someone with a letter (A A).

Possible options are:

- 1) Modify the policy to put name in First Name field.
- 2) Modify the policy to put the name in Last Name field.
- 3) Modify the policy to put the name in both First Name and Last Name fields (consistent with GA Driver's License).
- 4) Do not modify the policy to address this issue.
- 5) Other?

Question: Should the PINES policy be modified to address patrons with one-word names?



Comments:

- Follow the from whatever is given from the acceptable ID list.
- If this is how the Driver's License is handled, I think it is suitable for the library to use the same format.
- I agree. We are legally binding them to a contract when signing up for a library account. Keep it legal.