



OWWWLUG

Evergreen Updates

June 2020

Patron Self-Registration



Self-Registration

- Patron completes registration form on owwl.org
 - (Demo)



Request a Library Card

Home Library

First Name *

Middle Name

Last Name *

Preferred First Name

Preferred Middle Name

Preferred Last Name

Street Address *

Sample registration form



Self-Registration

- Form is routed to the “Pending Patron” list for the library selected by the patron
- Library verifies that patron’s address is within service area
- Library verifies that patron does not already have a card
 - (Demo)

Pending Patrons

Home Library:

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#	<input type="checkbox"/>	Create Date	First Name	Middle Name	Last Name	Email	Home Library	Street 1	City	Post Code	Requested Usernam
No Items To Display											

Pending Patrons list



Self-Registration

- Library loads pending patron profile into “real” patron profile
- Library assigns “Online Patron” profile group to patron (the Main (Profile) Permission Group field)
- Library completes registration
- Library mails card to patron



Self-Registration

- Patron is able to use card to access online resources like Owl2Go until card expiration
 - Restrictions to prevent checkouts of materials through Evergreen
- Patron can either:
 - Visit library when social distancing recommendations allow for in-person services to convert card to “Patron” type, or
 - Continue to use card only to access online resources until card expiration

Evergreen Adjustments



Some Earlier Evergreen Adjustments Still Apply

- The following notifications were turned off in March and will remain off:
 - 7 Day Overdue Email Notification
 - 14 Day Overdue Email Notification
 - 28 Day Overdue Email Notification
 - 8-Week Overdue Mark Lost
 - These two, too; more on them later:
 - Hold Ready for Pickup Email Notification
 - Hold Ready for Pickup SMS Notification



Patron Account Expirations

Executed:

- All patrons whose cards expired 3/1 through 12/30 set to expire 12/31/2020

Under consideration:

- Future adjustments to break up bloc of expired patrons
 - (Unintended consequence: holiday rush)



Current Checkouts

Executed:

- All items due between 3/15 and 6/30 had their due dates shifted to 9/30
 - (Less likely that there will be unintended consequences)
- Email notifications to patrons whose due dates were shifted to 9/30



Processing Returns

No fines accrue until 7/1

Then, fines resume accruing on items that had already been overdue as of 3/15

Strongly recommended:

- Check in materials using Evergreen's Amnesty mode in June & July
 - Removes fines from items that had been due before 3/15
- No need to backdate, but you can if you'd like -- it will be an extra "layer" of protection



Fines for New Checkouts

- To facilitate quarantine of materials returned on their due date:
- Universal adjustments to fine rules to create a grace period
- Fines won't begin accruing until 5 days after due date



Fulfilling Holds / Limiting Transits

Being executed:

- Going forward, holds will be fulfilled only by local copies (where pickup library = owning library)
 - Adjustments to previously-placed holds (pre-3/14/20)
 - Adjustments to settings will affect holds placed in the future (more on next slide!)
- No delivery between libraries (except clean-up runs over next few weeks) until further notice

Notes:

- Doesn't apply to items already captured (already in your bins from March!)
- Otherwise, Evergreen should be sending all items home to owning library
 - [\(Demo\)](#)



Placing Holds in the Future

- Hold permissions return ~7/1*
- Patrons will only be able to place holds on items where pickup library = owning library
- Hold limit will be 7 (system-wide)
- Hold limit will include suspended holds

Patron information:

- Update / explanation on owwl.org and OPAC banner
- *Keep an eye out for details of changes!



Hold Notifications

- OFF
- Libraries will have to contact patrons directly to arrange hold pick-up



Hold Shelf Expirations

- Items on hold shelves will expire, but please don't treat expiration date as a hard rule!

Tips, Tricks, and Tools



Baskets Help You to Place Patron Holds

- From the staff client, you can gather titles for patrons and place holds on these titles at one time using buckets
- Baskets are temporary -- they exist until cleared or session ends
- Important to clear your basket between patrons
 - Clear basket after holds are requested? (check box)
- (live demonstration)



Patrons Can Use Baskets for Holds, Too

- Titles can be collected for group or individual action
- Basket actions
 - View Basket
 - Place Holds
 - Print Title Details
 - Email Title Details
 - Add Basket to Saved List
 - Clear Basket
- Baskets are temporary -- they exist until cleared or session ends
- (live demonstration)

Questions?



In review

- PATRON SELF-REGISTRATION GOES LIVE 7/1/2020
- PATRON ACCOUNT EXPIRATIONS SET TO 12/31/2020
- DUE DATE FOR ITEMS CURRENTLY CHECKED OUT MOVED TO 9/30/2020
- 5-DAY GRACE PERIOD ON CHECK-INS
- USE AMNESTY MODE FOR CHECK-INS
- LOCAL HOLDS ONLY (PICK-UP LIBRARY=OWNING LIBRARY) ~7/1/2020
- HOLD LIMIT=7 (INCLUDES SUSPENDED HOLDS)
- NO HOLD NOTIFICATIONS
- NO DELIVERY EXCEPT FOR CLEAN-UP RUNS

**Please let us know
if something isn't
acting as expected.**

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Thank you for attending

