Minutes of Evergreen Advisory Committee Meeting
Pioneer Library System
Monday, May 6, 2019

Committee Members Present: Patricia Baynes (Palmyra/Wayne), Lisa Gricius (remotely) (Warsaw/Wyoming), Kelsy Hibbard-Baker (Geneva/Ontario), Judy Schewe, (Naples/Ontario), Frank Sykes (Livonia/Livingston), Tracy Whitney (Marion/Wayne)
Excused: Tim Niver (Victor/Ontario)
Others Present: Lauren Moore (Executive Director, PLS), Lindsay Stratton (Evergreen Consultant, PLS)

1) **Call to Order**
   The meeting began at 1:06 PM.

2) **Approve Minutes from March 4th meeting**
   Via email, Ms. Whitney moved to approve the minutes of the March 4th meeting. Mr. Sykes seconded. The motion passed 7-0.

3) **Old Business**
   a) Confirm By-laws

4) **New Business**
   a) Evergreen Functions
      i. OWWLUG
         Ms. Stratton discussed the purpose of OWWLUG (OWWL User's Group), which is "a forum to discuss day-to-day front line circulation issues, learn about the Evergreen automation system, share information with and get help from peers, and keep up to date with information from the PLS System Office." Questions about Evergreen are discussed at OWWLUG, which can be attended remotely by staff who are unable to attend in-person.

         Recording and archiving the meetings might be possible so that people who cannot attend/remote connect can hear what went on at the meeting. Ms. Stratton will look into this possibility.

         Highlights of OWWLUG meetings are usually included in PLS Notes along with a link to TWiki for more in-depth information.

      ii. Importance of support tickets to PLS
         Mr. Sykes and Ms. Stratton spoke about the importance of using PLS support tickets to report Evergreen issues. Submit tickets by emailing evergreen@pls-net.org . There is also a link on the Evergreen home page that says "Get Help with Evergreen." This opens to a page on the TWiki for submitting Evergreen tickets.

Tickets are the best way for PLS to fix Evergreen issues ASAP; otherwise, the issues have to wait two months until this committee meets again.

Tickets are also a way for library staff to submit suggestions for Evergreen improvements.

Mr. Sykes suggested PLS begin sending out a system-wide email when Evergreen issues come up so that everyone knows what the fix or workaround is.

iii. While in item record in OPAC, navigating from Syndetics suggested reads to catalog, then back (cannot navigate back to catalog item record) Clicking on a result in Syndetics Unbound (Reviews, Series, Suggested Reads, Summaries & More) opens up an instance of the OPAC. Click on the Back button on the browser to return to the staff-side.

Lindsay suggests starting from the OPAC because Syndetics is really meant for patrons and their side of the catalog.

iv. Feature in the old Evergreen wherein you could hover over the circulation history field in Item Detail (detailed) and see the yearly breakout of circulation
Ms. Stratton explained that this feature is not likely to be fixed or re-implemented. It caused Evergreen to run very slowly and so was removed. It is still a "wish list" item for future versions of Evergreen.

v. Hold slips not printing notification info
Ms. Stratton confirmed that a bug in the Evergreen web client wiped out all of the default notification method settings. For contact information to print on the receipt, two things must be present in the User Settings section of the patron account: a method (phone, email, text) and a value (phone number, email address, phone number with no dashes and carrier for texting). The method box(es) must have a checkmark.

PLS Notes on 5/8 state that "all patron records that had no User Settings / Notify By methods set … now have either phone or email options saved." Holds placed before this fix will not print with notification information.

Ms. Stratton suggested placing a note or alert in the accounts of patrons who do not want hold notifications, as the fix mentioned above will have reinstated hold notifications for them.

More information is available here.

vi. Patron account expiration
Mr. Sykes suggested that patron account expiration be extended from one year to three years.

The committee engaged in a brief discussion about the Monroe County Library System, which sends automated emails as a patron's account expiration approaches. The emails essentially say, "If none of your contact information has changed, we will automatically update your account with the current information for another year."

Mr. Sykes will bring this recommendation to PLSDAC.

vii. Overdue emails (do not state to contact library to renew)
Emails informing patrons of items that are going to be overdue or are already overdue do not contain any information on how to renew items. Mr. Sykes said that the templates should state how to renew items as well as the patron's home library contact information.

Ms. Stratton explained that Evergreen version 3 changed how these notices are configured. She has moved this up on her list of priorities and in future meetings would like to discuss the possibility of text overdue notices.

viii. Inactive patron purges timeline
Ms. Stratton confirmed that the current expired patron timeline lasts six total years.

Patrons move to expired after one year; inactive two years after expiration (three total years); and are removed from Evergreen three years after they are considered inactive.

ix. Placing holds issues
Ms. Stratton explained that when placing holds, the mouse cursor placement needs to be precise. It needs to look like a hand in order to successfully place a hold. If it is the standard arrow, then the mouse is not properly placed over the Place Hold button.

After placing a hold, the catalog shows what appears to be a blank white screen, which requires using the scroll bar or mouse scroll wheel to return to the top of the page. This is a known issue with the iframe and should be fixed in a future version of Evergreen.

x. Item check-in issues
Because the check-in page refreshes itself after every item scanned, it can start to run very slowly as it has to reload all of the information. Staff who

are scanning quickly might run into issues with items not being recorded as checked in if they are scanned during a refresh period.

Some recommendations include: use the Trim List (20 rows) button; turn scanner sounds off and instruct staff to watch the screen. Stands for scanners are helpful so staff can concentrate on watching the screen.

Ms. Stratton also noted that staff should pay attention to the barcode submit field, as sometimes clicking on alert popups may require clicking in the barcode submit field again.

xi. Birth year date format
In patron registration, birth year date format is currently YYYY-MM-DD. If staff forget the format, they can use the calendar button to select the date rather than manually entering it.

When in calendar view, clicking on the year allows you to click on a month or move backwards by year. Clicking the year again moves to decade view. These are ways to navigate through the calendar quickly.

Ms. Stratton can change the date format to MM-DD-YYYY. She is unable to change the staff client so that the example prompt appears showing staff how to enter the DOB (for example, as it does next to the daytime phone field).

Ms. Moore discussed how, from a data protection point of view, it is not ideal to collect a patron's full date of birth. Collecting a birth year would be safer. There was a brief discussion about how date of birth has been used to identify patrons in the past. Date of birth also plays into libraries with fine free status for juveniles.

Mr. Sykes will present this topic at PLSDAC.

xii. Evergreen upgrade update
Ms. Stratton said that PLS should be upgrading to Evergreen version 3.3 in September. The TWiki has a running list of new features coming with this update as well as bug fixes. Evergreen community documentation has more information.

xiii. Blank copy alert messages
Blank copy alert messages are a problem with corrupted templates which need to be deleted and replaced. Copy records need to be deleted and replaced as well. When frontline staff see this happening on items belonging to their own library, they should pass them along to their library's holdings maintenance staff. Holdings maintenance staff should

get in touch with Kathryn. She will need the item's barcode and the copy template.

b) Policies
    i. Employee confidentiality statement
Ms. Stratton created a rough draft of an employee confidentiality statement, using a policy belonging to Texas State University. There is some work that still needs to be done on it, including coming to an agreement on some of the terms in the document. Ms. Moore stressed that it would be helpful to scale down some of the library jargon so that it makes sense to new employees who have never worked in a library before.

If the final draft of the statement is approved by the PLS Board, all employees in the PLS system who have access to Evergreen would be required to sign this agreement.

Mr. Sykes will bring this topic to PLSDAC.

    ii. Discussion of patron agreements
The committee discussed the importance of patrons opting in to email and text communications, and understanding what they are agreeing to when they give this information to their library. Victor recently sent a mass email to opt-in to emails about library-related business and solicitation.

Patron statistical categories could be added for newsletter opt-ins.

    iii. [ALA's resolution on eliminating fines – Resolution of Monetary Library Fines as a Form of Social Inequity](#)
ALA adopted this resolution in January 2019. PLSDAC approved the resolution and will present it to the PLS Board of Trustees for adoption.

The resolution does not require getting rid of fines; see statements 2 and 3 at end of document. If the resolution is approved by the PLS Board, it is another support tool for directors who are considering going fine-free.

c) Proposals
    i. Automatic renewals
Evergreen 3.2 has an automatic renewal feature. This feature would allow PLS to set a specific number of auto-renewals based on circulation rules. Items are renewed before they are due to avoid overdue fees.

Automatic renewal will not renew items that are on hold; also, it will not renew items that have reached the max number of renewals.

Patrons whose items are renewed automatically will receive an email or

text notification stating that the item has been auto-renewed. Notifications are also sent stating an item has not been auto-renewed due to a hold on the item or if no remaining renewals are left.

Automatic renewals could begin as soon as the next Evergreen update in September 2019. It would have to be a system-level implementation; individual libraries would not be able to opt-out.

Frank will bring this topic to PLSDAC.

5) Set next meeting date/time
July 1, 2019 at 1:00 PM at PLS.

6) Adjourn
Meeting adjourned at 3:12 PM.

Respectfully submitted,
Kelsy Hibbard-Baker