

Minutes of Evergreen Advisory Committee Meeting

Via Zoom

Wednesday, October 6, 2021 at 2:30 PM

Committee Members Present: Jessica DeMarte (Perry/Wyoming), Debby Emerson (Wadsworth/Livingston), Kelsy Hibbard-Baker (Geneva/Ontario), Kimberly Iraci (Williamson/Wayne), Margo Prak (Bloomfield/Ontario), Erin Robinson (Arcade/Wyoming)
Others Present: Dan Guarracino (Automation Librarian, PLS), Ron Kirsop (Executive Director, PLS), Kathryn Riedener (Cataloging, PLS)

1. Call to order

The meeting began at 2:33 PM.

2. Old business

2.1 OWWL policy review

The committee will start reviewing a handful of OWWL policies at each meeting. We want to explore whether the policies are being followed by member libraries, and if they could benefit from any clarification or changes.

A. Loan limits

Patrons are limited to 100 checkouts. Most patrons do not come close to reaching the checkout limit, but libraries who serve homeschooling families sometimes run into issues. Because the families return a large number of items, staff can't check them in right away, and the patrons then borrow more items, which means the Evergreen limit has to be overridden.

B. Checkout blocks

Patrons are blocked from checking out materials if they have five or more overdue items and/or \$5.00 or more in fines. Individual libraries can override to allow checkouts. The committee discussed whether the \$5.00 limit should be increased to adjust for inflation, but ultimately decided not to change it.

C. Loan periods follow the checkout library's circulation rules

The committee decided to leave this unchanged.

D. Editing due dates when another library's item checks out with a "wrong" due date

This sometimes happens with TV series on DVD/Blu-Ray; some libraries have a three week loan for series, others do not. Patrons who are used to three week loans at their home library may expect a three week loan even if the item came from another library. However, even if home library staff adjust the due date for the patron, the item will renew with the original circ rule. For example, if staff edit the due date for a DVD that has a one week loan to make it a three week loan, it will renew for one week rather than three.

E. Editing due dates when a patron needs extra time

This most often occurs when a patron says they're going to be out of town. Nearly everyone on the committee reports that they only edit due dates if the patron will be out of town and needs more time, or the item originally checked out with an incorrect due date.

F. Standard loan periods

The standard loan periods were recommended by OWWLAC. The committee did not feel it was necessary to alter the standard loan periods.

2.2 Evergreen individual logins

A quarter of libraries have switched over to individual logins, with about another quarter scheduled to implement individual logins.

There have been some issues with staff remembering to sign out at the end of a desk shift.

Evergreen receipt templates are customizable. They can be specific ("you were helped by Jane") or more generic ("you were helped by the staff of the Naples Library"), or this line can be removed completely. Generic receipts might work better for libraries that have busy circulation desks where multiple staff share computers.

The Circ I profile was created for situations where libraries need limited Evergreen options for pages or volunteers.

3. New business

3.1 Update on "Items with no prices" report

The report now includes items with a price of \$0. Before, it was only looking for items that had no price at all (a blank field). Technically, \$0 is a price, so the report was not showing these items.

3.2 "Suggest a Title for Purchase" form on PLS website

PLS has a form on their website for suggested purchases. They receive about 2-8 submissions a month, and forward the suggestions to the circ email of the patron's primary library. Neighboring/peer library systems don't have a similar form on a system-wide level.

Many member libraries have their own suggested purchase form on their individual website.

PLS will get rid of this form so they are not acting as an intermediary, and instead link to the member library directory so patrons can contact their primary library directly.

3.3 Evergreen catalog search - Checking the "Exclude electronic resources" option isn't permanent

This is a known Evergreen bug and there is no patch yet. PLS monitors Evergreen patch announcements for a fix and will implement it once it is available.

3.4 “Additional details” section in item record

The old catalog allowed staff to look at a section in the item record called “Additional Details.” This allowed staff to see a summary of the item as well as the item’s subject terms. The subject terms were clickable so staff could use them to search for additional items matching that subject. Evergreen update 3.3 redesigned the staff catalog, which removed the Additional Details area.

This has been a subject of discussion between PLS staff and Evergreen developers.

For now, staff can look at the 6XX (600s) sections of the MARC field for subjects.

They can also click on the “Patron View” tab while looking at a record and access the Additional Details section there to see subjects. They can then copy and paste the subject into a subject search in the staff catalog.

4. Next meeting date/time

Wednesday, December 1 at 2:30 PM

5. Adjourn

The meeting adjourned at 3:49 PM.

Respectfully submitted,
Kelsy Hibbard-Baker