

Minutes of Evergreen Advisory Committee Meeting

Via Zoom

Tuesday, December 19, 2023, at 1:00 PM

Committee Members Present: Erin Robinson (Wadsworth/Livingston), Lisa Gricius (Warsaw/Wyoming), Kimberly Iraci (Williamson/Wayne), Margo Prak (Dansville/Livingston), Jessica Winum (Geneva/Ontario)

Others Present: Dan Guarracino (Automation Librarian, OWWL), Kelsy Hibbard-Baker (Technology Services Librarian, OWWL), Ron Kirsop (Executive Director, OWWL)

Excused: Kathryn Riedener (Collection & Resource Coordinator, OWWL)

1. Call to Order

The meeting began at 1:10 PM.

2. Updates and Announcements

2.1 TPAC sunset

The old OPAC (evergreen.owwl.org) will be sunset on January 8, 2024. A banner was added to the old OPAC telling patrons to switch to Aspen as well as linking to resources for how to use Aspen.

3. Old Business

3.1 Use of block function (new to Evergreen 3.11)

Since the upgrade, about a dozen blocks were added across the System, mostly from one library. Because we still don't have enough data about how the blocks are being used, we will come back to it in the late spring/summer.

3.2 Patron registration form review

The form hasn't been reviewed since 2019. It was suggested to remove secondary address and secondary telephone, and add mobile carrier. Because the form is a template, it doesn't need to go through OWWLDAC. Dan will make the edits and post the updated form to OWWL Docs.

3.3 Holds expiring off hold shelf frequency

OWWLDAC approved adding a "pick up by" date to hold notification emails.

4. New Business

4.1 Circulation policy updates

This was discussed in-depth at the last EAC meeting and brought to OWWLDAC.

The System would like to make OWWL-level circulations fine-free. This would involve working with libraries that aren't fine-free. The System would do all of the work so the libraries themselves wouldn't have anything to do. The ultimate goal would be to make sure that technical policies in Evergreen reflect everyone's written Board policies. Would make it easier for libraries to go fine-free in the future. This will be brought to OWWLDAC.

There was a discussion about the fine-free patron profile in Evergreen. Many libraries use this patron profile for current and past employees, and occasionally Board members.

Evergreen can be configured so that fine-free status only applies to specific libraries—Wood and Geneva have done that in the past. Ron pointed out that association libraries are fine to do fundraisers for fine-free status, but public libraries are not.

4.2 Claims returned

A staff member at a library expressed concerns about the claims returned functionality. The claims returned count can't be edited, even if the item is found and was missing due to the fault of the library. Additionally, an item that is checked in after having been marked claims returned does not indicate it had been marked as claims returned.

Dan said that we could create a "claims returned" item status in Evergreen. Currently, Evergreen marks claims returned items as "missing." Item status wouldn't change anything that you see on the patron account.

The count in the patron sidebar always displays the current number of claims returned. There is another count in the Edit screen that counts total lifetime claims returned, even if the item is found on the shelf due to library error.

Some libraries contact OWWL to change the number of claims returned after an item is found on the shelf. It would be possible to allow certain staff permissions groups to edit the lifetime claims returned count. The committee agreed that only directors should have the ability to edit the lifetime claims returned count.

Libraries use the claims returned count to identify patterns in patron behavior, so leaving the lifetime claims returned count is important.

Margo questioned whether it's possible for lifetime claims returned to expire after a certain amount of time. Dan said it would require custom code and that Equinox wouldn't approve.

The final proposal was to create a new claims returned status and give directors permission to edit the lifetime claims returned count. This will go to OWWLDAC since it has to do with changing Evergreen permissions.

4.3 New alert reports

Dan is working on two new reports. The first is a pending patron alert. This would go to circ accounts if there are pending patrons in the queue beyond 10 days old, or a large number of them.

The second is an unused Evergreen staff account alert. This would go to directors if Evergreen staff accounts haven't been used in a certain number of days so that the director can inform the System if the staff associated with the account has left employment.

Uncontrolled accounts appear frequently in OSC audits, so the unused staff account alert is meant to help with that.

4.4 Monthly circ report update proposals

Dan revamped the monthly circ report. It now counts checkouts and renewal types regardless of the source of the item. It also counts ILLs using same the methodology as the annual report (items sent/received rather than circulations).

The way that the old report works is that any circulations of items loaned by another library are counted in ILL received—they are not counted as checkouts or renewals. The new report would include these stats in checkouts and renewals.

This new report will run as a separate tab in the old report for a period of time so people have access to both reports.

4.5 Checking out computers to patrons

There are lots of approaches to this across the system. Some libraries check out computers directly to patrons, others to a generic account. This can cause some problems, namely the inflation of monthly circ stats (even though they are filtered out for the annual report) and privacy concerns (tying usage of a specific computer to a specific patron).

It's not unheard of for libraries to be approached and asked who used what computer when. If there is a warrant and the data is available, the System would have to comply with the warrant.

Some libraries do see a benefit to checking a computer out to a patron. It can provide data on who is using computers (school district/residency).

Could be a recommendation/procedure or a policy to come out of this.

Margo suggested a survey to see how different libraries handle computer checkouts. Margo will put together a draft of a survey about how libraries use the fine-free patron profile and how they check out computers; she is aiming to have this done by the end of January.

4.6 Permissions to create/update shelving location

This is something that could be given as a permission to library directors and staff with Item Cataloging permissions. It may be worth considering some guidelines for names, including using Title Case and having a reasonable character limit.

The committee agreed that directors and cataloging staff have the permission.

Dan would not recommend deleting shelving locations as there are Evergreen bugs related to this.

Dan will draft up guidelines.

4. Next Meeting Date/Time

Tuesday, February 20, 2024 at 1:00 PM on Zoom

5. Adjourn

The meeting adjourned at 2:54 PM.

Respectfully submitted,
Kelsy Hibbard-Baker

DRAFT