Minutes of Evergreen Advisory Committee Meeting
Via Zoom
Tuesday, February 20, 2024, at 1:00 PM

Committee Members Present: Erin Robinson (Wadsworth/Livingston), Kimberly Iraci (Williamson/Wayne), Margo Prak (Dansville/Livingston), Jessica Winum (Geneva/Ontario)
Others Present: Dan Guarracino (Automation Librarian, OWWL), Kathryn Riedener (Collection & Resource Coordinator, OWWL), Kelsy Hibbard-Baker (Technology Services Librarian, OWWL), Ron Kirsop (Executive Director, OWWL)
Excused: Lisa Gricius (Warsaw/Wyoming)

1. Call to Order
The meeting began at 1:02 PM.

2. Updates and Announcements

2.1 Aspen upgrade
Aspen will be upgraded on 2/22/2024. This update will add the ability to import lists from the old Evergreen OPAC.

3. Old Business

3.1 Reports of Evergreen slowness
There were reports of Evergreen slowness at the last EAC meeting in December. Committee members reported that speeds are better.

3.2 Patron registration form proposal
Dan will remove the secondary address field from the card version of the patron registration form, then upload both versions to OWWL Docs.

3.3 Holds expiring off hold shelf frequently
Data shows there hasn't been much of a change in hold pickup times or rates.

3.4 Survey
We will come back to this at the next meeting.

4. New Business

4.1 Stricter password requirements for patrons

It is public knowledge that our password scheme is the last four numbers of the patron's phone number. Phone numbers can be found online and are easily discoverable. Additionally, patrons may not be aware that they can reset their passwords.

Other library systems (like Southern Tier) have introduced stricter password requirements for patrons.

Margo asked if Evergreen is available to accommodate longer passwords; are they limited to numbers? Dan said there are very few limitations; passwords can be fairly long and include upper and lowercase letters, special characters, and numbers.

Can third-party services that depend on Evergreen accommodate complex passwords? OverDrive, Aspen, hoopla, etc.

Would complex password requirements be only for new patrons, or would it be for existing accounts as well? Dan said ideally it would be required for new patrons when accounts are created, but if an existing patron wants to update their password, then they would also have to follow the new complex requirements.

It's possible to require a password reset for everyone in the System, but it would be messy.

There was a suggestion to require a more complex password for new patrons and when patrons renew their cards.

Margo said we should let patrons know that it's an option to create a more secure password to protect their account. She asked whether the System could send an email blast to existing patrons about creating a more secure password. Dan said probably not, but we could put up a banner on Aspen and have dedicated help pages that describe new password requirements. Could also put something on owwl.org. Dan said we could also add a line to the card expiration email, pre-due notifications, and overdue notifications so that existing patrons would have information about the new password option.

From a security standpoint, staff should not be creating passwords for patrons. It should be something only the patron knows.

There is a way for Dan to see that a password reset link has been sent to a specific person and that a password has been changed. He can't see what a password is; they are encrypted.

4.2 Introduction email to patrons
We may be able to set up an email to be sent automatically to patrons when they register if they have an email address on their account.

Erin asked if there is a way to send an email to a pending patron who filled out the online self-registration form letting them know their application has been received and is in process. Patrons sometimes register multiple times.

The recent Evergreen upgrade added the ability to generate HTML email (can add formatting, headings, sidebars, colors, images, etc.). Other emails can also be formatted in HTML (i.e., overdue notices can include a picture of the book cover).

Jessica asked if the emails would be customizable per library. Dan said probably not, he'd have to look into it. Might be able to include library metadata, but couldn't insert a notice about an upcoming program, for example. Jessica said any way to welcome the patron and get the patron to their library's website, newsletters, and programs is a good idea.

Dan will do some testing and get a mock-up drawn up before the next EAC meeting.

4.3 Lost item mailer timing
Someone questioned the timeline for lost item mailers and when an item is actually marked lost. Sometimes the overdue/lost item notices are generated before Evergreen marks an item lost. Notices are generated at the first notice run after the item has been 28 days overdue, but items aren't marked as lost until 35 days overdue.

Dan does not recommend any changes but wanted to bring it to the committee's attention.

4.4 Email and SMS notification problems
Google and other large email providers made a significant change to the way they categorize bulk email senders as spam. The System complies with the new policies, but Dan wanted to make sure that libraries haven't had a big uptick in problems with patrons not receiving email notifications.

SMS is a separate issue. Eventually, the way we send SMS notifications may no longer work. The System is in the early phases of researching alternatives.

The committee members have not noticed any issues with either email or SMS.

4.5 Emails upon staff account creation
The System would like to email new staff with further OWWL details when we create accounts. The email would contain information on how to manage accounts, password requirements, where to find help, how to ask for assistance, a link to the Systems Access Policy, etc.

Margo said there's so much that new employees have to take in during their first days of training, having the email to refer back to would be helpful. Jessica agreed.

4.6 Aspen grouped works

Depending on how a title is entered in Aspen (with subtitle or not), identical works might not be grouped together. Do we want certain people to have permission to group these titles? They would need to be trained. Or would we rather have them report it like we do with record merging in Evergreen?

Margo asked if there is a way to generate a report of what has been grouped so that Kathryn can review. Dan said Aspen does create a list of anything that has been manually grouped, but it would be something that Kathryn would have to check on a regular basis since there wouldn't be an email alert. Aspen does show who made changes.

We will take this to OWWLAC.

4.7 Aspen/Evergreen tracker sheet

Dan has embedded a Google Sheet into OWWL Docs that shows all the Aspen and Evergreen issues that the System is looking at. He shared the link in the Zoom chat, and it is linked in the meeting agenda on OWWL Docs.

Libraries can still report issues via tickets, even if the issue is on the spreadsheet. This helps us determine if an issue is severely impacting workflow at member libraries.

4.8 Aspen training

Now that Aspen is the sole catalog entry point for the catalog, the System would like to hear more about what types of training would be most helpful.

The previous Aspen trainings were recorded and are accessible, but live trainings and having the opportunity to ask questions is also helpful.

Margo suggested a refresher training.

Dan said that any suggestions on training can be submitted via ticket.

4.9 OWWL Docs

There have been a couple questions about the usability of OWWL Docs recently. Dan asked the committee what they think about OWWL Docs, specifically for Evergreen documentation.

Multiple committee members commented that they have trouble finding things sometimes because there's so much content, even using the index and performing a search.

Kathryn pointed out that the index tries to guide people to the specific area they need by the topic beginning with "Catalog," "Holdings," etc.

4.10 Holds block all renewals

Staff at a member library submitted a ticket about this. A patron was not allowed to renew an item because there was a hold on the title, even though there were dozens of copies available at other libraries. Does this need to be rethought?

We may be able to allow renewals based on whether there are enough other copies available (based on a ratio). This has the potential to be another significant circulation policy project.

The committee agreed that it would be too much work for Dan, especially since the new autorenewal scheme might alleviate some of the issue.

4.11 Hold limit for staff
There's a gap in the hold policies that doesn't institute a hold limit for staff-placed holds. Dan isn't sure if this is intentional or a mistake. Staff with Circ II or above permissions would still be able to override the error.

Margo said that the error would help when patrons are requesting staff place multiple holds.

Dan suggests bringing this to OWWLDAC.

4.12 Update to 3-year inactive report
The System would like to remove deleted patrons from this report. They shouldn't be displayed, even on internal reports. Since this is a security concern, it should be brought up at OWWLDAC but won't require their approval.

4. Next Meeting Date/Time
Tuesday, April 16, 2024 at 1:00 PM on Zoom

5. Adjourn
The meeting adjourned at 2:33 PM.

Respectfully submitted,
Kelsy Hibbard-Baker