

Evergreen ILS Task Force Report to the eiN Steering Committee #2

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Task Force: Circulation

Task Force Chair: Sharon McRae

Task Force Members and Affiliated Libraries: Tina LaMark (CLP), Laura Perrier (CLP), Susie Waldo (CLP), Dwayne Robinson (CLP), Beth Lawry (CLP), Tim Williams (CLP), Darla Dietz (South Park), Kim Englert (Northland), Janet Forton (Scott), Julie Mareino (Mt. Lebanon), Kalyn Robel (CLAV), Vanessa Ryzner (USC), Betsey Swartz (Wilkinsburg)

*This is an incredible group of professionals with great expertise. It is an honor to work with them and I thank them for their time and hard work.

Progress to date:

Taskforce members met on the following dates: May 24, June 14 and June 21, in addition to email communication, phone calls and postings to the wiki. To date, members have focused on main functionality within the parameters of the test database:

- logging in
- check in
- check out
- patron functions (searching, registration, editing)
- bills/fines
- Reviewed and had a preliminary discussion of the holds process

Looking ahead:

- UMS collection agency conference call (June 28)
- King County conference call on the holds process (June 30)
- Two more taskforce meetings on July 12 and July 26 or as needed.
- Taskforce members will continue to identify further functionality gaps within the test database and post questions to the wiki for eiN staff, however, there needs to be further understanding of the holds process, circulation matrix, permissions, ILL, notices, messages and self-check. Much of this research will be outside the parameters of the test database.

Gaps in functionality (not prioritized):

General:

- No automated telephone notification, renewals, RSS notification or texting
- No customizable toolbars (back buttons, close tabs)
- Inability to customize consortium practices within the Evergreen system or add external links within the staff module. (i.e.—lost/paid form or give/link instructions on what to do with lost/paid forms, imdb, or fantastic fiction, novelist)
- There is a need to refresh/apply after every edit
- The user interface needs to be improved and more efficient—(custom layout to hide fields, tabs and buttons that shouldn't be used, inconsistency within the module such as

copy/paste/date format, dead ends need addressed.) i.e., search for a patron record, the data is retrieved on the left side, but then you have to click "retrieve patron."

- Not all item statuses are available from the Actions for Selected items menu.
- Inability to "undo" transaction
- System does not support internal messaging between patrons/staff via the My Account feature—"your card is in the lost box at Shaler, etc."

Patron registration:

- Inability to auto-fill fields based on library log-ins or auto-fill dates for messages, notes
- Inability to tab through fields while creating and editing patron records
- Need for more prominent alert when there is a duplicate patron name/address—in fact, there isn't an alert on phone, email when duplicates are entered
- Inability to insert customizable or "force" formatting or auto-fill
- Inability to validate mandatory consortium fields (name, address, phone, age, etc.)—shouldn't be able to save the new registration if the data hasn't been entered
- A lost card cannot be reactivated
- Inability to add electronic signature to the patron record (or photos, etc.)
- Inability to change the order of patron registration fields or customize
- No report for registration renewals by library
- No online card registration
- Fine history is not available to the patron in their online account

Check in/check out/renewals

- Inability to easily check in items from the patron record
- Cannot check in damaged, lost or billed items and alert staff
- Inability to set auto print for renewals within and out of the patron record
- Inability to retrieve more than the most recent patron

Fines/Bills

- Inability of staff to adjust existing fine amounts or reinstate fines that have been waived
- Cannot consolidate billing notices
- Cannot waive charges during check in
- No permanent "p" number
- There is only one option for Claims Returned
- Inability to pay by credit card within the staff module
- Inability to automatically bill—i.e., holds not picked up or replacement cards
- Inability to send notice to person financially responsible AND auto copy cardholder

Hold (not complete):

- System does not prevent a user from placing a hold on a local available copy
- "Opportunistic" hold capture will fill holds if an item is checked in at the pickup location, but it does not consider the owning location
- Inability to manually move a bib level hold to another item
- Inability to place holds via patron name in addition to barcode
- A new process will need to be developed for pull lists to be printed on the current yellow labels
- Inability to bulk hold