

KCLS Enhancements for Evergreen

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County Library System)*



KCLS Evergreen Timeline

2009

- The year of Circulation and User Interfaces

2010

- Acquisitions
- Serials
- Cataloging
- OPAC



Patron Registration

Our goal was to streamline the process for registering a patron by:

- Creating a single tab thru form
- Add field specific help files
- Providing the ability to auto fill City/State based on ZIP code
- Alerts and UI for pending addresses



1 Register Patron

Reload

Barcode	<input type="text"/>		Replace Barcode
OPAC/Staff Client User Name	<input type="text"/>		
Password	<input type="text"/>		
Verify Password	<input type="text"/>		
First Name	<input type="text"/>		
Last Name	<input type="text"/>		
Primary Identification Type	<input type="text"/>		
Home Library	BE		
Main (Profile) Permission Group	<input type="text"/>		
Privilege Expiration Date	<input type="text"/>		
Internet Access Level	<input type="text"/>		

User Settings

Hold is behind Circ Desk

Address Mailing Billing

Type	<input type="text"/>	
Postal Code	<input type="text"/>	
Street (1)	<input type="text"/>	
Street (2)	<input type="text"/>	
City	<input type="text"/>	
County	<input type="text"/>	
State	<input type="text"/>	
Country	<input type="text"/>	
Valid Address?	<input checked="" type="checkbox"/>	

This version of
patron
registration is
all on one
screen



You can limit the fields to those defined as required or select “Show All Fields” or “Show Only Required Fields”

Save

Save & Clone

[Show All Fields](#)







Save


Save & Clone

[Show Only Required Fields](#)



You can also define local help files that staff can access by selecting the magnifying glass icon

	OPAC/Staff Client User Name	<input type="text"/>	
	Password	<input type="text"/>	
	Verify Password	<input type="text"/>	



That will display on the right-hand side of the screen

Save

Save & Clone

[Show All Fields](#)

Password

will auto-fill the last 4-digits of the home phone. However, they can now have an alpha numeric password. The password must be at least 4 characters in length.



No Patron Selected Merge Patrons Search Form Retrieve Patron

Search for Patron

Include inactive patrons? Limit results to patrons in Everywhere

Last Name: Address 1: Phone: Barcode:
 First Name: Address 2: Email: OPAC Login:
 Middle Name: City: State: ID:
 Alias: ZIP:

Search

Clear Form

Birth Date	Family Name	First Name	Middle Name	Home Lib...	Home Library (Full Name)	Barred	Active	Group ID
12-03-1989	Smith	Theresa	Mildred	RB	Richmond Beach	No	Yes	160135
07-26-1972	Smith	Theresa	Amy	IA	Internet Access Only	No	Yes	129463
06-12-1996	Smith	Theresa		TU	Tukwila	No	Yes	123727
03-13-1985	Smith	Theodore	Justin	BR2	Example Branch 2	No	Yes	30884
01-19-1980	Smith	Thelma	Christina	EB	Downloadable File	No	Yes	83026

Maximizing Screen Real Estate and Information Access



Improved Presentation of Patron Data in Summary Display

Patron Search

Carlson, Amy Doris III Merge Patrons Search Form Retrieve Patron

Patron Info
 Carlson, Amy Doris III
[Date of Birth:](#) <Hidden>
 Library Card: [390805](#)
 Holds Alias:
 OPAC Login: 390805
 Email:

Addresses
 6849 Few Writer Bypass
 Milan MI 48160
 Mailing Billing [\(Copy\)](#)

Phone Numbers
 Day Phone:
 Evening Phone:
 Other Phone:

Account Info Identification Group: 0.00 Stat Cats

Catalogers
 BR2
 Internet Some
 Expires on 10-01-2014

Barred	Family Name	First Name	Middle Name
No	Carlson	Albert	David
No	Carlson	Alex	William
No	Carlson	Alice	Kristin
No	Carlson	Amanda	Erin
No	Carlson	Amy	Marie
No	Carlson	Amy	Doris



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Patron Info
Carlson, Amy Doris III
[Date of Birth:](#) <Hidden>
Library Card: 390805
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Phone Numbers
Day Phone:
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Account Info Identification Group: 0.00 Stat Cats

Catalogers
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Barred	Family Name	First Name	Middle Name
No	Carlson	Albert	David
No	Carlson	Alex	William
No	Carlson	Alice	Kristin
No	Carlson	Amanda	Erin
No	Carlson	Amy	Marie
No	Carlson	Amy	Doris

More information available to staff at a glance and a mini tabbed browser for easy access to additional account details



Improved Screen Real Estate and Other Patron Account UI Enhancements

The screenshot displays a web-based library management system interface. At the top, there is a menu bar with options: File, Edit, Search, Circulation, Cataloging, Acquisitions, and Booking. Below this is a secondary navigation bar with icons and labels for Check Out, Check In, Item Status, Patron Search, and Patron Registration. The current page title is 'Patron Search' and the selected patron is 'Patron: Carlson, Amy Doris'. A specific bib record is identified as 'Bib Record: ocm34615884'. The main content area shows the patron's name 'Carlson, Amy Doris III' in a highlighted box. To the right of the name are several buttons: Refresh, Check Out (highlighted in blue), Items Out, Holds, Bills, Edit, Messages, and Other. Below these buttons, statistics are shown: 0 items out, 0/0 holds, and \$0.00 in bills. The 'Check Out' section features a form with a barcode input field, a 'Submit' button, and a 'Specific Due Date' checkbox. The date is set to 07/15/2010 and the time to 9:26:25 AM. A table below the form lists the checked-out items:

Barcode	Due Date	Title
71502561	07-16-2010 11:59 PM	Best of breed : the American Kennel Club's multimedia guide to dogs
2036513295	07-16-2010 11:59 PM	The new encyclopedia of the dog

At the bottom of the interface, there are several utility buttons: Print Receipt, Export, Copy to Clipboard, Save Columns, Strict Barcode (checkbox), Auto-Print (checkbox), and Done.

Group Options

1 Patron Search | 2 Patron: Carlson, Amy Doris | 3 Patron Search | 4 Patron: Bonner, Bradley

Bonner, Bradley

Refresh | Check Out | Items Out | Holds | Bills | Edit | Messages | Other

4 | 0/0 | \$82.93

(See Notes) (Maximum Bills) (Maximum Overdues) (Has Bills) (Has Overdues)

Bonner, Bradley
Date of Birth: <Hidden>
Library Card: 000681
Holds Alias:
OPAC Login: pacman
Email: bbonner@kcls.org

1004 Nevada St
Milton WA 98354
 Mailing Billing (Copy)

Phone Numbers
Day Phone: 253-859-3330
Evening Phone:
Other Phone:

Family Name	First Name	Balance Owed
Carlson	Matt	
Carlson	Matthew	17.01

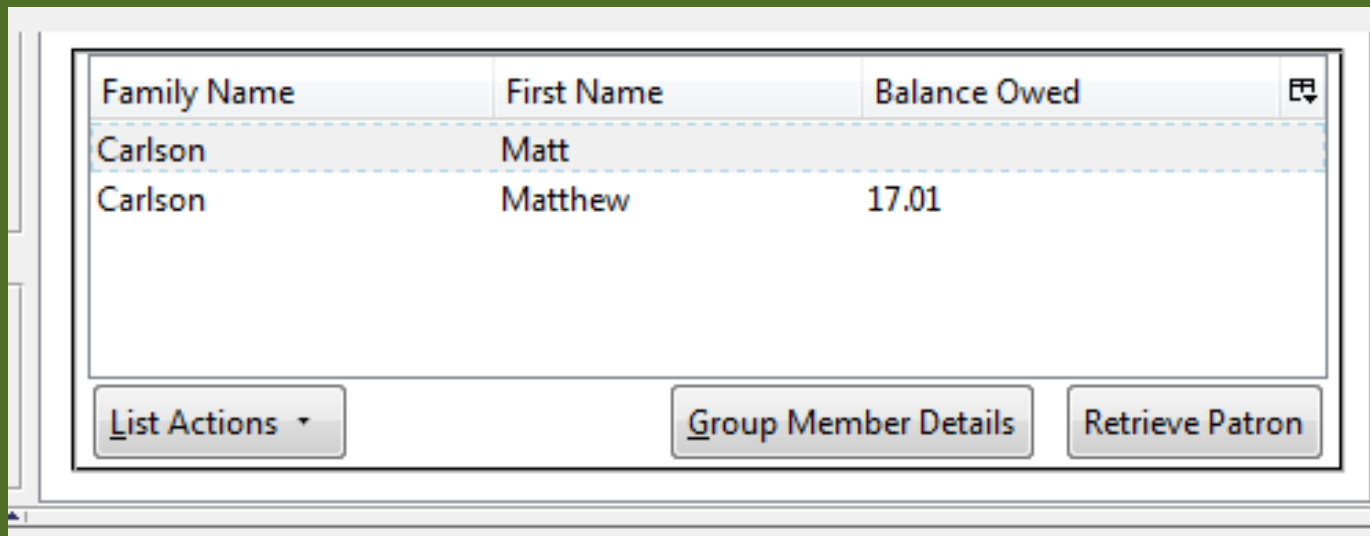
List Actions | Group Member Details | Retrieve Patron

Group Members
Total Owed: 99.94 Total Items Out: 0 Total Items Overdue: 0

Active	Barred	Last Name	First Name	Is Group Lead Account	Middle Name	Balance Owed	Items Out	Items Overdue
t	f	Carlson	Matt	f	2	0	0	
t	f	Carlson	Matthew	f	Thomas	17.01	1	2
t	f	Bonner	Bradley	f		82.93	0	2

List Actions

Group Options



Family Name	First Name	Balance Owed
Carlson	Matt	
Carlson	Matthew	17.01

[List Actions](#) [Group Member Details](#) [Retrieve Patron](#)

Brief display available in patron summary provides name and balance info with options to retrieve the record in another tab



Group Options

Group Members									
Total Owed: 99.94 Total Items Out: 0 Total Items Overdue: 0									Choose an Action...
Active	Barred	Last Name	First Name	Is Group Lead Account	Middle Name	Balance Owed	Items Out	Items Overdue	
t	f	Carlson	Matt	f	2		0	0	
t	f	Carlson	Matthew	f	Thomas	17.01	1	2	
t	f	Bonner	Bradley	f		82.93	0	2	

The full Group Members display provides more information on group members and management options for the group



Streamlining of Bills Interface UI

Bill History

Total Owed: 17.01

Total Checked: 35.00

Refunds Available: 17.99

Credit Available: 0.00

Pay Bill

Payment Type: Cash

Payment Received:

Annotate Payment

Manual Charge
History
Actions for Selected Transactions

Balance Owed	Bill #	Finish	Start	Total Billed	Total Paid	Type	Title	Payment Pending
✓ 35.00	19384		06-09-2010 3:...	35.00	0.00	grocery		0.00
-17.99	18380		03-26-2010 7:...	0.00	17.99	circulation	The graveyard book	0.00

List Actions ▾
Check All
Uncheck All
Check All Refunds
Print Bills
Receipt Options ▾

Voided this session: 0.00

Change Due Upon Payment: 0.00

Convert Change to Patron Credit

	Payment	Change	Total:	Owed	Billed	Paid
Pending:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>		<input type="text" value="17.01"/>	<input type="text" value="35.00"/>	<input type="text" value="17.99"/>
Checked:	<input type="text" value="35.00"/>	<input type="text" value="35.00"/>		<input type="text" value="0.00"/>	<input type="text" value="35.00"/>	<input type="text" value="0.00"/>



Fines Payment History: Transactions

Bill History

Transactions Payments

Selected Billed: .70 Selected Paid: .70

Start Date 07/ 15/ 2009 End Date 07/ 15/ 2010 Retrieve Transactions

Balance Owed	Bill #	Finish	Start	Total Billed	Total Paid	Type	Title
0.00	18370	05-20-2010 1:40 P...	03-23-2010 2:2070	.70	circulation	Gateway drugs
-17.99	18380		03-26-2010 7:48 ...	0.00	17.99	circulation	The graveyard book
0.00	18372	05-20-2010 1:40 P...	03-23-2010 2:27 ...	10.50	10.50	grocery	
0.00	18371	05-20-2010 1:40 P...	03-23-2010 2:27 ...	2.50	2.50	grocery	
0.00	18057	01-26-2010 5:54 P...	12-30-2009 1:05 ...	1.30	1.30	circulation	Best of breed : the American Kennel Club's ...
0.00	18046	01-26-2010 5:26 P...	12-18-2009 2:3730	.30	circulation	The new encyclopedia of the dog
0.00	18666	05-20-2010 1:40 P...	05-18-2010 8:16 ...	2.50	2.50	grocery	
0.00	18459	05-20-2010 1:40 P...	04-09-2010 7:56 ...	3.00	3.00	circulation	The enhanced occupational outlook handbo...
0.00	18458		04-09-2010 7:55 ...	3.00	3.00	circulation	Rich and poor in America : a reference hand...
0.00	18461		04-09-2010 8:32 ...	3.00	3.00	circulation	The graveyard book
0.00	18460		04-09-2010 8:26 ...	3.00	3.00	circulation	The dangerous alphabet
35.00	19384		06-09-2010 3:04 ...	35.00	0.00	grocery	

List Actions ▾

Print

Add Billing

Show Item Details

Full Details



Fines Payment History: Payments

Bill History

Transactions **Payments**

Selected Paid: 1.20 Start Date: 07/ 15/ 2009 End Date: 07/ 15/ 2010 Retrieve Payments

Amount	Payment ID	Note	Payment Date/Time	Payment Type	Voided?	Transaction Type	Last Billing Type	Title	
1.20	19		01-26-2010 5:26 PM	cash_payment	f	circulation	Overdue mater...	Best of breed : the...	
.30	20		01-26-2010 5:26 PM	cash_payment	f	circulation	Overdue mater...	The new encyclo...	
.10	21		01-26-2010 5:54 PM	cash_payment	f	circulation	Overdue mater...	Best of breed : the...	
17.99	81		03-26-2010 7:50 AM	cash_payment	f	circulation		The graveyard bo...	
.70	184		05-20-2010 1:40 PM	cash_payment	f	circulation	Overdue mater...	Gateway drugs	
10.50	183		05-20-2010 1:40 PM	cash_payment	f	grocery	Test Billing 2		
2.50	182		05-20-2010 1:40 PM	cash_payment	f	grocery	Test Billing 2		
3.00	188		05-20-2010 1:40 PM	cash_payment	f	circulation	Overdue mater...	Rich and poor in ...	
3.00	187		05-20-2010 1:40 PM	cash_payment	f	circulation	Overdue mater...	The graveyard bo...	
3.00	186		05-20-2010 1:40 PM	cash_payment	f	circulation	Overdue mater...	The enhanced oc...	
2.50	185		05-20-2010 1:40 PM	cash_payment	f	grocery	Test Billing 2		
3.00	189		05-20-2010 1:40 PM	cash_payment	f	circulation	Overdue mater...	The dangerous al...	

List Actions Show Item Details Full Details



Staff Client Activity Log

5 Most Recently Logged Staff Actions

[Refresh](#)[Retrieve Item](#)[Retrieve Patron](#)

Message

When

EQ

admin circulated 71502561 to 390805 (Carlson)

Thu Jul 15 2010 09:28:41 GMT-0700 (Pacific Daylight Ti...

admin circulated 2036513295 to 390805 (Carlson)

Thu Jul 15 2010 09:27:17 GMT-0700 (Pacific Daylight Ti...

admin edited 390805 (Carlson)

Thu Jul 15 2010 09:19:50 GMT-0700 (Pacific Daylight Ti...)

Recent staff actions, such as materials checked out

5 Most Recently Affected Patrons for Logged Staff Actions and Last Action for each

[Retrieve Patron](#)

Message

When

EQ

List of last patrons



Clear Hold Shelf

- A process that removes holds from items that have expired on the hold shelf and generates a report listing items to be pulled from the hold shelf
- Options to print sorted according to local policy
- Last hold shelf location is retained in the item record



Clear Hold Shelf

Hold

Pickup Library: **BE** Bellevue View Shelf-Expired Holds Actions for Selected Holds

Available On	Capture Date	Current Copy	Last Notify Time	Notices	Pickup Library	Request Date	Status	Title	Type
07-30-2009 9:57 AM	07-30-2009 9:57 AM	30000000002091		0	BE	07-30-2009 9:57 AM	Ready for pickup	Harry Potter & tên tù nhân ngục A...	T
06-23-2010 8:58 AM	05-24-2010 8:13 AM	2035623954	06-23-2010 8:58 AM	1	BE	03-02-2010 9:36 AM	Ready for pickup	Christmas ideas	T
06-23-2010 9:46 AM	03-15-2010 10:48 AM	2060910110	06-23-2010 9:46 AM	1	BE	03-02-2010 10:26 AM	Ready for pickup	A dog's life : the autobiography of ...	C
07-07-2010 9:40 AM	07-07-2010 9:40 AM	2063856344		0	BE	05-19-2010 11:13 AM	Ready for pickup	Dewey : the small-town library cat ...	T
07-07-2010 1:28 PM	07-07-2010 1:28 PM	2068703756		0	BE	07-07-2010 11:31 AM	Ready for pickup	My Guantánamo diary : the detain...	T
07-07-2010 1:05 PM	07-07-2010 1:05 PM	2066971819		0	BE	07-07-2010 12:46 PM	Ready for pickup	Black coffee	T
07-12-2010 10:07 AM	07-12-2010 10:07 AM	2066971900		0	BE	07-07-2010 12:47 PM	Ready for pickup	Black coffee	T



Item Details

- Consolidated view of item details currently available on various screens
- Accessible from the item status page
- Planning on adding access from OPAC and Circulation screens*



Item Details

Item Status

2035623954 -- Item is captured for a Hold.

Scan Item

Barcode:

Detail View

Title: Edition: Created By: Last Edited By:
Author: Publication Date: TCN: Last Edited On:
Call Number

Barcode	<input type="text" value="2035623954"/>	Owning Library	<input type="text" value="CA"/>	Call Number	<input type="text" value="PER CHR 2004"/>	Status	<input type="text" value="On holds shelf"/>
Price	<input type="text" value="50.00"/>	Copy Location	<input type="text" value="Adult Periodicals"/>	Renewal Type	<input type="text"/>	Due Date	<input type="text"/>
ISBN	<input type="text"/>	Loan Duration	<input type="text" value="Normal"/>	Total Circs	<input type="text" value="0"/>	Checkout Date	<input type="text"/>
Date Created	<input type="text" value="10-01-2004 12:00 AM"/>	Fine Level	<input type="text" value="Normal"/>	Total Circs - Current Year	<input type="text" value="0"/>	Checkout Workstation	<input type="text"/>
Status Changed	<input type="text" value="06-23-2010 8:58 AM"/>	Reference	<input type="text" value="No"/>	Total Circs - Prev Year	<input type="text" value="0"/>	Duration Rule	<input type="text"/>
Copy ID	<input type="text" value="16948"/>	OPAC Visible	<input type="text" value="Yes"/>	Renewal Workstation	<input type="text"/>	Recurring Fine Rule	<input type="text"/>
TCN	<input type="text" value="ocm05763227"/>	Holdable	<input type="text" value="Yes"/>	Remaining Renewals	<input type="text"/>	Max Fine Rule	<input type="text"/>
		Circulate	<input type="text" value="Yes"/>			Checkin Time	<input type="text"/>
		Circ Modifier	<input type="text" value="47"/>			Checkin Scan Time	<input type="text"/>
						Checkin Workstation	<input type="text"/>

Alert

Trim List (20 rows)

Strict Barcode



Connexion

- Support of the OCLC product Connexion was a requirement for KCLS
- This will provide staff the ability to edit MARC records before loading them into Evergreen



MARC Import Profiles

Go Back Reload Go Forward Debug Print Page

Export Records Import Records Inspect Queue Edit Attributes **Edit Merge / Overlay Profiles**

Overlay / Merge Profiles

Context Org Unit:

[Back](#) [Next](#)

✓	Name	Owner	Preserve Specification	Replace Specification	Add Specification	Remove Specification
<input type="checkbox"/>	Connexion	1	000			



MARC Import Profiles

Go Back Reload Go Forward

Export Records Import Records Inspect Queue Edit Attributes Edit Merge / Overlay Profiles

Evergreen MARC File Upload

Record Type Bibliographic Records

Create a New Upload Queue or Add to an Existing Queue

Auto-Import Non-Colliding Records

Auto Merge/Overlay Exact Matches

Auto Merge/Overlay When Exactly 1 Match is Found

Merge/Overlay Profile

Import Attached Holdings

Holdings Import Profile

Select a Record Source oclc

File to Upload: Browse...

Upload



Telephony

- Enhanced patron notifications with support for Telephony
- Leveraging off of Asterisk
- Adds ability to issue automatic overdue notices, hold availability notices, billing notices and courtesy notices with a high degree of staff and patron configurability



Other Current Enhancements

- Message interface - message status controlled via message wizard, option to require staff initials, ability to define local messages and easy edit/archive options
- Help Popup - Locally definable help pages, KCLS templates will be shared with the community as a starting place
- Password test - quick option to validate patron password in staff client
- Hold Note - Ability to add notes to patron holds

