BATCH CREATION OF STUDENT CARDS

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>> Can you see my screen?

>> Yes up here.

>> It looks like it's 4:00. One last session here for today in this Track 1. This track is made possible by Cardinal, with light captioning made possible by equinox with the library initiative. We would like to thank our sponsors. They will be talking about the creation of student cards. I'll turn it over to them.

>> Thank you. So as we said, we are going to be talking about our project that we took over this past year and this year, that creating student cards. So first we will talk about the goals of the project. The primary goal of the project was to expand access for K-12 students. Our current policies are any Georgian of this age can get a card, but juveniles have to come in with their parent or guardian. So was this idea that if we could batch import students from their school's database, they would have access to digital materials as was being able to check out physical materials at the library as well. So we would lower that barrier to entry so that students could have more access. So that was the primary goal of the project.

As most projects do, we started out with a pilot. So for the pilot, we did start off with just one library system and with that library system we started with one school system. The libraries we cooperated were the public libraries and the school system was the Savannah Chatham County public school system. And those are both in Savannah. They are in Georgia. So just for a final reference, helping the project was is that we had 16 libraries in the regional system and for Savannah Chatham, there are 68 schools, and over 34,000 students that were all part of this project. One of the first steps that was done for the project which I'm going to cover in the next slide is that this pilot was approved by the governing board, which we call the governing committee, and there was a set of policies that was agreed upon by the executive committee to try this. So the governance of the pilot could have changed because there were more libraries that are interested, but this is the framework that we wanted to start off with.

The first thing started out with was up we were going to allow duplicate accounts. At first we kind of wobbled if we wanted to match accounts. So in the students, we going to try to find some matching points so we can connect them to -- they already had PINES.

We decided we wanted to do proof of concept, so we did duplicate accounts.

So kids already had a PINES card account with full privileges, when we did at the batch import made them have another account which was this limited student a card account. So we agreed that was a okay, that they could have both. The so that was the first thing. The second thing was it was decided that an opt out model would be useful rather than an opt in.

So the library director had previously done a similar project at a similar library, and they did it with an opt in model were they would send out papers with the students parents and saying opt in for the child to have this card, you can use it in the library. But they had a very low enrollment rate doing it that way. So instead, we started using an opt out model and had a lot more success doing it that way. So it was decided that this project would be an opt out model to where the students data -- the student's data would be imported into Evergreen and if a parent wanted to opt out before that data was imported, we just wouldn't approve them. If we had no response, then you would be imported. So that was the opt out model that we went with. It was also decided that for the student cards that not only do they give access to the library system's digital materials but we would also be able to check out physical materials from the library. So it was decided that there were no restrictions. Just five items checked out and two holds.

One of the holds was kept really low because we did not limit that to the system holds. So the students could put a hold on anything anywhere in PINES, which would bring other library materials into play. So the number of holds was kept low. And then it was decided that there was the question of what if materials were never checked out? What if they get lost or damaged? What are we going to do about those? So the library system

proposed that parents or guardians for students that check out those materials, the parent or guardian would be responsible for those.

But if something that was owned by another PINES library, they would take responsibility for paying fees. So that was sort of the internal what are we going to do about this suggestion. Since it was a pilot, we just wanted to get off the ground. And that was accepted by the executive with what to do about lost items.

So those are the main governing policies around the project that kept us in the framework of what we could do. So as far as what had to get off the ground before could even go forward, is the library system is the one who put this proposal in front of the executive committee. So they had to affirmatively say we would like to do this. So that was the first thing. Because the cards could be used at any PINES library theoretically or could pull from any PINES library, because it is usable in a PINES library it was a decision that was made by the membership, the governing board. So after that, then there was a memorandum of understanding that the library and the school system, they had to get together and actually hash out with lawyers and everything else. Because the school system had to have that MOU with the library that they would be sending data to us. So we had to hash out an MOU about what was going to happen with the schools and the data. So that was a big first step. Beyond that, we actually started to get into getting the project off the ground. Then we had to make a decision on we have this school, what should that be matched to?

At first we tried to buy ZIP Code put them together. But that doesn't always serve the students best. So we sent that list to the library system so that they could decide that this school is either closer to the school or to this library or this library would better serve this particular school and so they decided that the home libraries are going to be, and I was just in a spreadsheet.

We also need to talk about online learners. Because the way we decided to do the barcode was just to have a -- prefix because we wanted it to be different from other barcodes. So we had to talk to other lenders that we didn't want the students not to access those online materials. So we needed to let them know that they should approve any logins with that prefix as was the regular one. As far as the coordination of the actual project, the PINES staff, we primarily dealt with the data side of the project and we also coordinated with the school technical staff. And at the library, so everyone knew what was going on, our primary role was getting the information into Evergreen at what happens from that side of it.

Now, the library system, they were responsible for the MOU with the school system, all of the marketing, all of the communication, everything on the ground as far as if the project was going to be rolled out. So we had two different spheres. So if you are going to pursue something like this, and you follow the model that we did, it would be the library system that was responsible for the on the granting and then tech doing the other side of it. With that, I'm going to turn it over to Chris to talk about the process.

>> Okay. Is that visible? I can't really tell. It is thank you. So to develop this tool that we needed to use to import these cards, we sat down for several sessions thinking at the details of what sort of data do we need to store, what does this need to look like, what do we need to take into account to automate the creation of these cards in line with the policies and process that Tiffany was just outlining. So we needed something -- we are future proofing this, not just for one library, something that doesn't care where the data is coming from. As I mentioned, it was automated, so the last thing that we need to be doing is sitting there every day clicking on buttons, importing school data, when we are running a consortium. That could easily become a full-time job. So we needed to have as little staff as possible. And we really needed ways to create the account, update the account, and delete the accounts. So I decided to use PERL. I didn't pull in Evergreen libraries, but I could sense that's kind of where Evergreen lives,

is in PERL. And we back it with a student card database schema. So on the school side, you create a CSV file that would be designated to have designated fields for. I'm going to share a link in the chat real quick so you will be able to follow along. And see what we did. Sorry for the wait here. Nobody likes watching typing.

Okay. It's true that we are having meetings so people can see my dogs. The link I just sent you is where the code lives. If the repository were the code lives and it's got all the documentation that I'm not going to go into. But it shows the file format and the assumptions and things like that. If you're interested in the gory details of database creation. So we take that CSV file from a secure FTP or SCP location that the school has provided for us. And putting that burden on the school rather than through email or something like that, it's better for them to have ultimate control of that access for privacy reasons and I'm pretty sure legal reasons as well. So it has to be over a secure connection. We can't afford to lose that data. That would be catastrophic. And then it was mentioned, the students had not opted out. Tiffany said student opted out later. Now, the Evergreen side, we created the database schema and populated that some of school data associated with the library branch that the school was closer to and kept a little more information in their them actual use, but things like the school address and technical contact and things like that. We could expose it later in an interface. That's what I had in mind, but it this point, it's just access. For the actual process, the script logs into each configured school systems FTP associate look location. We just have a thing of school, but theoretically we would have five schools, it will start with the first one download any new files, matching our convention, and then process those. Then go to the next school and downloading files from that one. It will then parse the CSV file and there are ways you can do that in PERL. One of them depends on the name of the column, which is probably simpler to make sure the right data is in the right field. But we decided rather than depending on that, that the column order was a better approach. Then a

check to see does it have the required fields. If it does, we test to see if the student ID already exists. If it does, call this an update. And what an update well do is it will certain fields be preserved like username and password. They can change passwords, but anything like address or name or whatever, gets overwritten with whatever the school is sending in.

We figure if they are sending us this, that means there is updating that needs to be done. We discourage staff from tinkering with the accounts. We created a student card permission group and that's how we control the number of circulations. We also create the barcode username so we have a three digit school code that we assigned to each of the school districts and then whatever the school ID number is that they give us and we will generate a default password of month and date of their birth date so it's not a super secure password but it does require a little bit of knowledge on behalf of the student. This does give us some protection. The school name is added to the secondary ID field that's like driver's license or whatever it would be other, and have the school name. That's just to give us a way to record that information. And then we asked the schools to provide parent guardian information, but if it doesn't come in, we just use the schooling. It is kind of true that the school in this case is in the -- roll. And just for searchability, and reports can use this to, we added the grade level to the name keywords.

For opt outs, the files that come in for opt out, look exactly the same as an import file, that they are named with the words opt out in the name. And if the script sees it's an opt out file it will delete the account fully from the database. In point so typically don't delete anybody's account, we rename things to keep the integrity of the circulation, some holes, in this case and say privacy issue, the parent says I don't want this, I never did want this, we just act like it never existed, and we will delete the account. The other thing we do is time-wise, it was set the accounts to expire September 15 of the following school year. In Georgia the school year begins in early August so this gives a little bit of a cushion between the beginning of the next

school year and when they would consider the account expired for a student to continue using. And once the account is expired, we will delete it after one year. That is an automated process as well. The idea is that the script runs and stripped sorry thing. And at this point since we are still in the pilot phase, we don't have don't quite have it there -- epic we were experiment in with column names pretty late in the project. I think I will pass this to Terran and hand it to you.

>> Steal the screen back. I'm not muted, am I?

>> No, we can hear you.

>> Okay. It's been a long day already. There were several policy and procedure issues that have already been touched upon that we are where could become problematic. So we are watching those closely and looking at ways that we might adapt our processes and procedures to accommodate problems that we encounter as Chris and Tiffany both talked about, the opt in versus opt out was a big point of contention.

For the pilot project, the library system did want this to be an opt out program. They actually tried doing a mailer, like a paper registration form that went home to the parents of the schools undercut for responses or something like that. They had a bunch of student card drives.

They had a really difficult time getting the parents to go through the step of signing them up, even though the parents were necessarily against it, if he were going out of their way to do it. So by making this an opt out program and informing the parents that the children will be signed up unless they tell the school that they don't want to participate, the library and the school both expect the usage rate to be a lot higher. Not everyone is convinced that this is a responsible use of student data, mainly for security reasons. But also because it could potentially put the parents on the hook for lost or damaged items that they were necessarily aware that their children were even picked checking out if they weren't paying attention at home or the information the school is sending out.

And his parents may also not be aware that the public library cards provide access to a lot of different types of library materials that the school library doesn't -- things the parent might not think are age-appropriate and may not be available through the school library.

So we are monitoring that. So far, we haven't had any problems, but since we don't have a lot of usage yet, we don't have any good data. Chris and Tiffany have already talked about duplicate checking. This is just to reiterate. We are monitoring to see if there any problems in the future. We don't really think it's going to cost some problem is, that there may be confusion if the child comes in has a student card at a public library card that the child might not even be aware that they are two different accounts. And so they might be confused, take all of their books are on one card, when they are on the other. Physical cards is another issue. We decided to not issue physical cards with this. One just being a practical and financial reason is that we would have to create a new kind of card that we don't currently have because we use preprinted barcodes on the cards we currently have in order to use the student IDs, we would have to come up with a different way of creating those cards.

However, the students at the schools in the pilot program all have student ID cards that already have their number on them. So we are considering that sufficient to use as their library card. We may encounter schools in the future as we expand the program that do not have those ID cards, so we may have to come up with other options for those students unless the students memorize their numbers or something like that. It just remains to be seen.

And one thing that we don't have a good solution yet is how to handle lost cards. If they are using their student ID card what happens right now is that for the school system, is that the school just produces another card for them with the same ID number. They keep the same ID number throughout their K-12 education as long as they stay in the school same school district. So in PINES, we issued them a new number. But since we have to match

that student ID card, we don't have a great way to handle that if somebody else finds the card or steals it, they could use that card without the library knowing that they are using a loss card. So we are monitoring that as well and trying to consider their ideas.

One thing that we will do differently next time we bring a school on is that when we create the card, we have an automated new user email that goes out automatically. And when that happened, the school district had not actually told the parents that this was going to happen. So we assumed that they had. That was a bad assumption to make. So the libraries and the schools -- the libraries rather had a bunch of parents calling them, asking what was going on, that someone had stolen their child's data. So we customized the work and email based on groups saying the message that went on the student card was different and they were to contact the school or the library -- rather than the library if they wanted to ask questions or opt out. In the future will just emphasize that the school district really needs to inform the parents ahead of time.

Chris had mentioned we don't have a way to stop staff from making changes to these accounts. And we also don't have a way to prevent staff from creating accounts with the student card group. So we do count on reports to see if there are any student card calculate it created at the wrong locations, with a library that is not part of the project or with a barcode format that we know it's not a student card. So we can ask libraries to –

(Ringing.)

Sorry about that. That's my time. This is mainly a staff training issue. Staff need to know that appearance come in and say I have moved, I have a new address, they need to get that to the school and the school needs to change in their database and we will then get that. There are certain fields that would not get overwritten name that he feels that the student or the parents of the student can change themselves such as the username and password and email address and things like notification preferences. And

then we don't allow -- we don't want the barcode to be changed either, because that's what we match on.

We got really lucky with Live Oak in that it is a large district and they have a dedicated IT team that understands the data. We don't expect that to be the case with all schools that we might work with in the future. So we expect that we might have to step in more or we may even have to can indicate with third parties or fourth parties in this case since there are already three parties involved. Such as the County IT, they are supporting the school district or another vendor supporting the school district.

Also we know that there are three main student information system vendors that work with the public libraries in Georgia. We don't know if we end up expanding this project into private schools, if there other SIS vendors or if there are in-house systems. So we are making the assumption that these databases will be able to export the data we need into a CSV file and we do have to be conscious that we may have issues with that at some point if the database is in a modern type of database that can do that type of thing or if they need extra customizations to their database to be able to do that or they need to pay for those exports or anything like that.

The time commitment for this is higher than we really thought about at the beginning. Of course, doing the pilot project, we spent a lot of time on it because there were so many things to work out. But just the time commitment of managing communications between PINES, delivery system, and the school system, we were expecting to spend 20 hours for each school system. And I believe there are 181 school systems in Georgia. Not all of them will be interested in this.

Even if a third of them are, this is going to be a very large project. So we are currently seeking to hire a part-time employee to manage the next phase of the project because we don't have the extra time on our own staff right now. And the next phase of the project will be bringing on a handful of other library systems that have volunteered to be our next set of guinea

pigs. So I think there are six or seven systems on the school they are working with that want to do this next. Unfortunately, we had hoped that we would have some good usage data by the time the conference came around.

But the COVID-19 closures happened almost immediately after we did the batch imports and they started informing the parents and the students. And also because of that there haven't been the nightly or weekly updates to student data because student haven't been in school. So hopefully in a few months we will have a lot more data as schools open back up into fall. We will have gotten through a full student data batch import for the next school year's worth of data at that point. Were hoping to have more usage data before we brought any other schools on board, but unfortunately, we will probably need to bring a lot of the schools on board before school starts next year before we have any real data. But so far, it's working pretty smoothly. We haven't run into any real issues yet, and we are crossing our fingers that it will stay that way. If anyone has any questions or if Chris and Tiffany have anything else they want to talk about --

>> I will underline the time commitment issue. Besides developing this in the first place, which it is software you can use if you are interested, so you don't have to reinvent the wheel, there are others that are doing this, I note Jeff Gordon at -- is doing something.

But really the time commitment for us came from having to deal with school administration, like the system administers that the schools saying we need it this way, and they would send us a file that was almost right, but not quite. And we had to do a lot of for back-and-forth for them to tweak it. And then they would be off for three days or dealing with other things so things that should have probably just taken a day took like a week.

So there were a lot of delays like that that were more about communication then anything that was process related. You just needed to get hold of people at the right time. But once it is set up as long as nobody tinkers with

it, it should just kind of work. And that's are some since with telling our higher-ups that this is even feasible.

(Technical problems.)

>> Files, because that's what acquisitions does, goes out to check to see if there is anything there, pull it in. So that was our model that we are trying to work on. So I just wanted to -- and this is what Chris was saying -- it's more like talking to people. Once Chris had done the hard work, coding it, after that, the library system said that sounds great. Let's do it. But there are all these moving pieces that the school system doesn't necessarily know that you need, and the library either. So having that guiding person to move it in the direction it needs to go is really the biggest part of the job of getting life with this. The technical tools there.

>> I just noticed Jeremiah said they had issues with element or schools not actually issuing the cards to the kids. The teachers kept the cards. I suspect that's happening with some of the schools in the district as well. Since we just talk to the school's technical higher level administered a staff, we haven't talked to the actual teachers. The library is handling that level of communication with the schools and that's not something we are doing. So we are not sure how that is going to work out, either.

>> And the other thing, the agreement has to be between the school and the library locally. Our job is facilitating that relationship as far as the technical part goes. But it's really between them. And are some parts of the communication that are necessary between me and the school, we include everybody on every communication. We try to discourage side chat and things like that because it can really mess things up.

>> I have a question for you all. When parents opt out, their child, what if the child already has things checked out?

>> We haven't hit that issue yet. I'm not sure what happens when you try to delete an account with the things to having been checked out here that is something I hadn't considered. I would presume –

>> A new headache.

>> Right. It's probably dumb, but I think our assumption when we talk about a possibility was if they were opting out, they wouldn't be using the card. But human beings do weird things.

>> I expect some parents will expect that they are being billed for lost items and that's when they will want to opt out. But this hasn't budged since February when we loaded the files in, and it was a few weeks after that, that the school sort informing the parents. We don't even have an opt out file yet. So we don't have procedures worked out for that.

>> I would share my -- from Cardinal so you can see what it looked like when we did a similar thing. This is what our circulation accounts look like. We implemented some time back in January 2017. And as you can see, the summer months actually ended up being months for we would see spikes in circulation. So summer of 2017, some have 2018 and summer of 2019, even though these accounts were associated with the schools and being used in class, we found that that the resulted in a lot of access, whatever, during the summertime.

>> Benjamin, are the cards for your schools giving full check out permissions are they limited in any ways like ours are?

>> The vast majority a lot in circulations, no fines. We have one library system that chose to do no actual circulation, just electronic resources. And there is one more wrinkle.

>> It's books only.

>> No resources. You can't get something from another library system. So we have I think 18 or 33 or 40 A systems participating. So since their local labor system is taking on the risk of these nonparent sentient accounts, whatever you want to call it, we don't allow them to grab books from their library systems.

>> We had that same conversation at the consortium leadership, the executive committee okayed it. Because it is such a low number of the items that can be taken out, they were willing to do it. Because I think a lot of them want to do it themselves, and wanted to see it work.

>> It's really been cool -- that's exciting when all roles out and really takes off.

>> That is what I was about to say. It was really another huge side -- huge down side of the pandemic is that we were not able to see this would work in a normal summer school year. We went live and then boom, this happened. It's on pause right now until we really know -- until we can really see the circulation activity.

>> And we also don't have access to any statistics for digital usage. All of those contacts are handled by the libraries and they don't go through PINES. So they -- though they are authenticating against us we don't have any access to check out statistics or anything.

>> One of the things we were able to do and you may find useful if you can look at the table of authentications and link that to the user type so that gives you a section, even though it does give your original resources. We found that to be allowing the student access accounts -- it deals with the unique dedication spirit.

>> That's a good idea.

>> It looks like -- have done something similar. For MOBIUS and CW Mars, maybe we can tweak ours if you will be willing to share yours.

>> Hooray for open source software.

>> I have to look at the query, but we did is there is a table that tells you -- let me go back and look. It will be quicker than trying to explain.

>> Do the -- the student going to a specific group called school, and that includes the students and the teachers.

>> Are you thinking of patron activity, Benjamin?

>> Yes.

>> That is stored separately in a SIP log.

>> Yes.

>> Just to not be outdone by Chris' puppies, I'm going to share a picture of one we are hoping to adopt Thursday.

>> How cute.

>> So adorable.

>> We are excited.

>> I was also distracted by the dog.

>> Well, so was I. I was thinking, oh God, and I'm now a parent of teenagers, it is like having toddlers again.

>> So Rochelle is going to developing new feature, it looks like.

>> That's a query that I use. Using user activity linking it to user, looking for a certain event type anti-profile of the account.

>> Perfect.

>> Okay. We are getting short on time. Does anybody else have anything? I guess we are the last one of the day, so we don't have to end, do we?

>> Just grab a drink. Maybe we can develop some new software while we are here.

>> Cool. Jennifer posted that there are some specs out there.

>> Perfect.

>> So have we figured out whether --

>> Always a likely possibility.

>> Michelle, this is my pride and joy. I may have had a really long day and I'm getting a lot goofy.

>> I think we are.

>> I guess we will pick up at 1:00 tomorrow. The reports will start at noon. But the other session starts at 1:00.

>> And that will be me.

>> All right. Cool.

>> See you all tomorrow.