

## Evergreen International Online Conference 2020

### Thursday Track 1

June 11, 2020

#### Reports that Help Your Patrons Now

>> DEBBIE LUCHENBILL: Good morning or good afternoon, on behalf of the outreach committee I would like to welcome you to date three, section 3, the Evergreen international online conference. We would like to thank Mobius for sponsoring track one in equinox open library initiative for sponsoring the closed captioning for the conference and also big thanks to Karen our closed caption are on this track great if you're not finally with Zooms webinar controls take a moment to acquaint yourselves with them. Feel free to use the Q&A or questions or -- use the razor hand icon to speak. Make sure your drop down in the chat if you wish to use the chat is set to all panelists and attendees not just all panelists. The session is being recorded and it will be on the Evergreen project YouTube channel sometime after the conference had without further do, I would like to introduce Angela Simmons Jones and Dixie Henning will talk about reports that will help your patrons now. You can take it away.

>> ANGELA SIMMONS JONES: Hello this is Angela Simmons Jones. Can everybody see my screen I just shared? I work at the house and County Public Library system and I've been on staff since 2013 and before that I was in the military for over 20 years in the Air Force. A lot of the job I did in the Air Force crossed over rather easily into the library system. And so this is one of the projects I've been working on with in my county. Reports that will help your patrons now. The goal for using the monthly reports. Is to fulfill patron holes reflect accurate items status and ensure patron information is correct.

We will go over the three different areas, item status reports, old reports that breaks down into in-transit too long and hold maintenance which breaks down a little further and patron card checks.

Monthly item status report, there are two versions that I use, the regular Evergreen report I can run and it will look at items from the previous month and it will go to item statuses you can select. And there is the quick report version that shows every item with that status. It can go back to when your system joined Evergreen. This report is used to show any items based on the items I select-- search for the item, verify status-- that will be scheduled for deletion. So bindery

cataloging bindery, catalog, discard/weed, in process, cancel transit, damage, reserves and temporarily unavailable. This is the data I pull that I can request from quick report. The next slide is the data and is pulled from a regular report.

These are samples of items in different statuses that I had previously listed. The edit dates, some can go back far. Some will not be catalogued for a year. Or damage for six years or in process for many years and these items are not available to the patron because they are not in available status. So they need to be bound if possible. So the next report use in-Houston County is the new card report. This lets me see all the information input into our system and all the cards issued that month. One of the biggest problems we have come across is the format for the driver's license for the patron primary identification. The incorrect format is used. You can create a duplicate card easily for that person. I will make sure all of the computers at the Circ desk have a sample format, this best practice format here is what is on each monitor. Everybody can refer to it in case they cannot remember in this report -- it allows me to double check that. This is a couple of samples, someone used a state abbreviation which it might be for Delaware but that is not the accurate abbreviation. Somebody put in a space after the GA and the dash, and one of the patrons, the information was entered as military ID. This is the quick report version that I asked the computer to run and this is the regular report version of raw data.

I got the number of new cards created for my monthly board report. I go over and find errors, I email the branch and let them know what correction needs to be made. Depending on how the patron filled in their card, hopefully, it has the state included in that primary identification field so that could be added if it was missing or simply a space taken out and the primary identification corrected. If the information is not on the patrons card that they filled out, I ask that the branch put a note on the account so the next time the patron comes in they can show their ID again and that information can be added to their account. The next thing I will go over is the hold reports. These reports will help you locate your items and get them moving. So we will go over the in-transit too long and the hold shelf maintenance.

So when items are routed from one location to another put in-transit status and when it arrives at its destination it must be checked in. If it arrives at its destination but not checked in it will remain in-transit status. So in the catalog that item is not available. In-transit too long I recommend the library checked their transit list regularly. I checked hours monthly, you can even do it weekly. With library's being close now and trying to catch up. Once things are settled down this will be something elaborate would want to take a look at in a few months to

make sure anything got stuck. So the staff client is where you go to get that report under administration and the local administration and then that transit list.

So this is the transit list. During normal times, items staying within the county should only be in-transit for a few days. If they are going out of county or system, normally it would take an average of three-five weeks so I use the criteria to sort the columns when the report is brought into excel so I need to grab anything that is in-transit too long. If the item is found to check it in, if it is not found the item is marked missing by the owning library?

This is when the Bats was going from my library to another branch in the county in October and it was never checked in. The book does not belong to my library and so hopefully belongs to this library, that is the important thing, both systems working the report, especially if it is your book, so you can have the correct size. ARL would check their shelf and hopefully it is there and they would check in. If neither of us find it, it would be marked missing. Next we will go to the hold shelf maintenance list which consists of two lists. I use the on hold shelf too long. Normally you would check your hold shelf and go into Evergreen and browse the hold shelf. You can see items that are canceled but you could only see your hold shelf. You can see other items on another library hold shelf so this report does that. It is used to locate books sitting at an out of county hold shelf for too long in have not, the first one is not been canceled by the patron or staff but it's been on the hold shelf for too long?

This is the regular report. It's the raw data that is pulled. Enter the less than date two months from today's date because you want to give the item enough time to be in-transit to be checked in for the patron to be notified and have them have enough time to pick the item up if the item is not picked up that additional time of it sitting on the hold shelf, it should appear on this report. So I go back about two months. So I import the report into Excel, email the pickup library, and request the patron be contacted to see if the item is still wanted. If they no longer want the item then the hold request needs to be canceled and the item checked back in. In the case of this, this is an item that belongs to Houston County. It is sitting on a whole shelf-- I think it is a Live Oak library since the end of January. And so I email them and ask them to contact the patron and either cancel the hold or the patron would pick it up. And check it out. If it is canceled it needs to be checked in and sent on its way.

The next list we will -- go over is the cancel hold at other locations. If an item is on another libraries system hold shelf and the patron is canceled the item it will not show on the on hold

shelf too long report. So this report is run through regular Evergreen reports. This is the raw data.

This report is a little tricky. When you go into Evergreen reports the first org put in is for all libraries. And the second org ID I put in is just my branches. And I use the filter drop-down to select HOU as the owning labor. Always use the previous days date, and then you want to double check to ensure the item status has not changed, say if you work the report a day or two later. Here are some samples, these items belong to Houston County. They were canceled -- this one was canceled February 17. But it is sitting at the shelf at this library location. I will email the pickup library and request they check the item in. Since the patient has already canceled these holes that action doesn't have to be taken.

This pushes the pickup library location to maybe browse the hold shelf to see if there are other canceled items belonging to other libraries that can come off-the-shelf bids once the item is checked and it can be sent on its way. We have had instances in the past where the item cannot be found at the pickup location. So that needs to be communicated back from the pickup location to the owning library so the item can be marked missing.

Does anybody have any questions? I see where Diane said, it is great, the problem is that not all the -- all libraries manage the list or follow through when you ask them to mark something missing. And that's where I try to get the owning library to be the one that marks the item missing. Just to make sure -- I will stop my share -- just to make sure that the owning library is the one that then becomes responsible and would show up on the item status report that they would run monthly for damaged, missing, lost, long overdue MacLean was returned it and they would -- the item would be look for again and it is up to the director to decide when the missing items would be deleted.

Does anybody have any questions?

>> DEBBIE LUCHENBILL: Catherine asked, what date range do you use for the transit list.

>> ANGELA SIMMONS JONES: I will go to my notes. I run the report monthly. And then I go and I tell it, once I bring it into Excel, so -- I have to do it two different ways. First, I look at the items in transit between branches in the same county. Because those items should only be

in transit for a few days. I mark these in Excel, usually with an X, all the way to the right. In a new column. Because then I will go into the out of county list and I will go back three-five weeks. So it also depends on holidays. I go back about a month and so the item is enough time to be in transit so usually it is a straight out 30 days from the date that I am running the report, is where I sort those columns.

>> DEBBIE LUCHENBILL: A couple comments I think just came to the panelists, says she starts the date they migrated and ends 3 weeks ago. Catherine says our system uses from beginning to make sure we catch them all.

>> ANGELA SIMMONS JONES: With a different version of some reports, sometimes I go in and I say show me the previous months. Item statuses that went on -- in the past month, but I notice when I the quick report version it goes back to the beginning and I find items that have a really old date, if you work the quick report version or the Evergreen report going all the way back to the beginning of when you join, and you work that report, you will never have to work those dates again. So initially might seem overwhelming because there might be a whole bunch of items going back. We joined in 2006, and our list is over 200,000 items for Georgia that are showing this tricky status that are not available to the patient and it will seem overwhelming at first but literally they only have to be marked or worked once a month updated if the items are found and checked in and are now available. That will fall off that list. After that it is just maintaining the reports every month.

I also go back just to be sure, depending on how busy we are and how many volunteers we have, I will run it at your back and see if there is anything I missed. They can take a look for it and we can get the status updated. So, someone said, I never thought about checking the hold shelf of other libraries. Brilliant.

So I try to be really polite-- I note--know different libraries have a different length of time that they keep books on their shelf, depending on how popular the book is. If it is Where the Crawdads and I will keep an eye on it and try to get back in circulation faster. This helps over all with our patrons getting there holds faster and making sure items do not get stuck on other hold library shelves.

Our PINES policy does say for seven working days. And I know that we have had a little bit of leeway at times when you have a patron that you know comes in certain days of the week or

they have a pretty good stack and you know, well, they will be coming in, and one of these books is over the seven days but the ones I am focusing on, on the list are ones well over seven days on the shelf. Like I said, now with libraries being closed, I am not pushing it as hard. I work the list two days ago, and have a standard email that I use, trying to be really polite and explain why I am asking for my item back.

Initially, when I first started working this report, there were a lot of items that were hung up on other library shelves and we were able to find problems going on at other libraries. Where items disappeared off the hold shelf. Hopefully, that has been resolved now. Keeping the books moving is my goal. Are there any other questions?

If anybody wants to see the raw data for each report, I can send that. My email is [ajones@houpl.org](mailto:ajones@houpl.org). I've also created a training book in my office. But I can refer to because each report is run different so that is a good thing for me to refer to. As well as these slides. And so, Megan -- and Billy? Yes -- all of these slides will be available, this recording will be available.

Any other questions?

>> DEBBIE LUCHENBILL: If anybody --

>> ANGELA SIMMONS JONES: If anyone wants my Megan and Billy, if you want to send me an email, I can send you the slideshow or the specific raw data. That you would like.

>> DEBBIE LUCHENBILL: All right, thank you Angela, for that really informative presentation, I think that will be very helpful. And thank you everyone for attending, there's still plenty of time before the next session and because the recording is going so please continue in the chat, interacting with each other. And if you are attending the next session on this panel, batches, baskets, and bookbags, and so forth, that will start at 3 PM Eastern. So, 2 PM here, noon Pacific time [Laughter]. So, feel free to stick around or you can log out and go to the other track. So thank you again for coming, Angela. And we will see you all later.