The Evergreen Project

STAFF\_CHR: Standing Penalties and Group Penalty Thresholds

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For the PowerPoint will make available it has light of the terms we will go over and it in some links to some bugs that are applicable and some of the additional permissions you will need to consider in some of the bugs, please feel free to refer to it later on but we are going to try our luck and go live we are on a 3.7 sandbox so keep that in mind it has Concerto information on it.

We are going to start in the standing penalty so to access standing penalty go to administration local administration, standing penalty is. The standing penalties are global, meaning the entire consortium shares some is not away to scope standing penalties to justice system or library so for example if your library did not want to prohibit patrons, can I increase my screen size

>> There's a couple things they can do, in the bottom right is a square bracket we can expand all the visual space.

>> Thank you, Rogan, and did my Zooming and help a little bit?

If you don't want your patrons to be blocked from circulation if they have, if they exceed their fines, that something you can discuss at a consortium level because there is not a way for you to separate out your library's wishes from the others. If you need to create a distinction such as our library doesn't stop patrons from pleasing holds on items they have Max fines, and everyone else does, let me reverse that. Say everybody else excludes holds from having too many fines but we don't want to so you try to create another standing penalty you can do that but you have to write the accompanying scripts to go with it.

Standing penalty, we will create would be applicable if we want to manually apply the standing penalties so we will take a look at that.

Let me expand my rows

I have it set for one of the examples we will step through but here's our beloved staff, and alerting block and circulation holds and renew, you will see the staff as a way of saying, staff members have applied this block and the block is going to include circulation holds and renewals.

Did that help?

>> If you hover over underneath where it says leave, it should show as three dots and give you a full-screen option.

>> I have will screen now; I can see chat now.

>> I can watch out for chat

>> Thank you.

And so, let's go ahead, I wanted to mention looking at the broad overview, if the patron exceeds fines, out-of-the-box the invalid patron date and phone, these guys we see here with zeros, those are out-of-the-box and the rest of the standing penalties you see here out-of-the-box Evergreen is looking at the workstation the penalty has occurred at. For example, with your staff CHR out-of-the-box whatever staff applied penalty you have or block you made on the patron account is going to be applicable to the patron at the workstation that this penalty was created. If the patron goes to branch B, they will not encounter this block and the patron. If your consortium, and you can't sculpt as per library it needs to be a course your decision, if they feel it is vital that everybody sees a potential staff applied block on the patron's account, you need to come in scope your org depth to zero. Ignore patron exceeds fines, it's also at the workstation level. These are definitely set the way out-of-the-box.

Let's go ahead and take a look at the block list while we have it handy and talk about the different ones what they mean. Circ is a block and being able to check out materials, Hold placing a patron's ability to place a hold and renew is a block in the patrons' ability to renew items. And you have capture and fulfill them were introduced later but they have been around for a while.

Capture but the block and the capturing of a hold so you might configure your standing penalties to where the patron can't place a hold but the staff members will go and capture the hold it won't be on the Pull list.

Or the patron can place a hold and staff member will capture the hold it will be on the hold shelf waiting for the patron when they come in to check out the hold, but the fulfill will be a penalty on the patron. Some libraries make the configuration choice as a way to get the patient back through the door.

Let's create a new standing penalty.

The blacklist defines what will block we will block circ, use a pipe symbol to separate blocks, ignore proximity I have a different example set up for us to explore this, but what it does is allows you to skip over your library or system to not be considered in this penalty. For example, if you have org depth zero and proximity at two will take a look at that, the patient would be held to the penalty for exceeding fines at the library outside of your system but not within your system and again, we will take a look at it at the patron and the item have to match up in the proximity.

Next, we have a label, the label is what you will see in the drop-down when you manually apply a penalty to the patron. We will and have two different names.

The name is what your staff members see when they try to check out to the patron and they see the sexual penalty so we put a block and circle when we put this suspended patron block and the patrons the staff member tries to check out to the patron the name is a reason, they will see for why the circulation cannot occur.

We will go ahead and scope this out to our consortium, the default would be the workstation, staff alert is what will put the text in red for your staff members, if not it treated like a silent note. We will put a staff alert and save. We will come back to this, but first we will go and look at our group penalty thresholds and cover the different, how to set a group penalty threshold up.

For group penalty thresholds we go to administration, local administration, group penalty thresholds, you can scope to the library I login it but we can go to cons and sorted by ancestors or descendants, when you set up your group penalty thresholds and I hope to get to it and I think I saw April in the audience, April put in an interesting one out for a while affecting when you set up your group penalties at the system level.

I hope to get to that end we are first going to look at setting the effects of setting up the group penalty thresholds at the consortium level.

You can use the rule of inheritance with group penalty thresholds, for example if you have a patron exceeds fines at the consortium level at $10 but the library B as their patron exceeds fines set at five dollars Evergreen will honor the five dollars versus the 10.

We also have the inheritance coming to patrons, all the other users in the consortium can have in this example, a checkout count of 10 items. Our temporary patron can only have two, Evergreen will recognize that distinction.

We will create a new group penalty threshold, so you define which patron group and say temporary, and we will set this up at the consortium level acknowledging a lot of consortiums out there do set up at the individual system level and some of those implications. We are going to do patron exceeds fines and or penalty, and for the threshold we are going to put their threshold at five dollars. Again save. This is an example where everybody else in the consortium can have a threshold of $10 where our temperate patron is only going to have five dollars. While on this topic and I remember, when it comes to the fines, if the patron gives you one, and gets their fine down to $9.99, that clears that penalty for them, Evergreen does not make you pay the entire charge off, if they are you $10 there is not a mechanism in Evergreen that makes the patron pay the full $10. That would be an in-house manual process that you adopt, I know other do accommodate but Evergreen does not, it just wants to below the threshold.

However, you define it.

Quickly we are going to take a look at notices and action triggers, under administration, local administration, I apologize I feel like am talking fast but I have quite a bit to go through, notifications action triggers, here are a few hooks already in the default Evergreen, I will filter for specific name here.

>> While we have a quiet moment there are no questions yet

>> Thank you. I don't know what happened to my -- let's try to so.

>> What can go wrong in a live demo will

>> There is an out-of-the-box notice already or find limit exceeded so if we click into the parameters of the action trigger, we can see this is an actual notice we can send out to the patron letting them know they have surpassed their find limit and I also want to point out under the hooks, there are other preloaded hooks available.

I wanted to make you aware these do exist and you can use them and create more.

Next, we will take a look at patron notes and alerts and how those are affected by our standing penalties.

I'm going to go to check out, I already have some notes already set up for us, so we will go through them.

On the alert page when we first going to our patrons account, we can see the alerts and I don't have any actual blocks on the patron yet, so let's take a look at how these different notes and alerts were created.

As a brief overview forgave fines is in the edit interface, patron left laptop is in messages interface and notes, it takes us into the notes let's first take a look at the alert message within the patrons edit interface, when you are editing a patient account or you are registering a new patron, you have this free text box or alert messages you can use, it's very popular among librarians, convenient, it's also an inconvenient lease to put notes while you are registering your patrons. This particular alert field, there is no box, just alert. It does not require initials. Is not a mechanism to require initials here.

The message we created in the alert message is defined or summarized under the patient's name here.

Next, we have the notes, under other, we have notes and when you create a note under the other option will appear in this indicator next to the patron's name, this might be house and of your migrated notes came over, depending on how you migrated and what your notes were, some libraries choose to bring them over in these regular notes, some choose to bring them over as alerts, and some choose to bring them over as staff HCR which we will come to. A lot of libraries have penalties in their legacy ILS, the previous I'll ask, they might have notes that there was a penalty but they are not necessarily concerned with it being treated the same way, or they do want it the same so they might bring hundreds of patrons over with a penalty and on the first day staff members are not counting a lot of staff see HR figuring out what is going on.

That is something to keep in mind, but with the notes, we are not going to add a new note but I want to point out you can create a title and a value ended this particular interface it allows you to create a patron visible note. It displays in the patrons OPAC account, so if you need to let the patient know something of a nature, you can make a patron visible and they will see it in their account.

If you have the library settings, there are two settings listed in the PowerPoint for enabling initials.

Finally, we have messages, and this is where staff CHR comes into play, I have created a regular note and alerting out and vote no blocks alerting no blocks, if we go back into our standing penalties and do a comparison, the alert note -- let's do it this way. When we click apply penalty the first note is a silent note and corresponds to silent note in your standing penalties, I note, no blocks, no staff work, you can come in and edit and change that but the change would affect the entire consortium. Looking at it out of the box and a lot of consortiums don't touch this interface too much.

We have alert, that is corresponding to our alert note and this is an order note, no blocks, it provides a staff alert so that's where that is pulling from.

Finally, we have our block. If we were to use block and put whatever the messages for that block, it's corresponding to our staff see HR. For some of you who might have migrated over with a block and a patient account and you are encountering staff CHR, it's because the block was set in this interface. Or it may be another staff number has come in and settle block so when you see staff CHR it lives in the supply standing penalty block.

We also earlier created that penalty for the patron account is suspended, since we set up to be manual, under penalty type is now going to display force. Suspended patron, that is the label we created for our standing penalty.

I am going to have to put in my initials and again that the library setting to do that. You can see here under library, it gives us an indicator of where you standing penalties are living, for the block we created, or suspended patron we sent it out to the consortium, these other penalties are using the default which is our workstation library login.

If we go and attempt to check out to his patron, let's refresh to be sure, let's grab an item. Unable to check out item and the reason is patron account suspended, name we gave the standing penalty is what the staff member will see is the reason. Staff CHR when you put a block and you don't pick a different penalty type it defaults to staff CHR. That's where that would be pulling from if you encounter that.

We won't finish that check out. That's how that all pulls together you can create standing penalties for being able to apply manually to the patron account if you want something there for automated reasons, action triggers or something, you need to develop the scripts and code and things of that nature.

Next, we will take a look at the ignore proximity. Let's go back, in our standing penalty interface I have my patron exceeds fines threshold modified. The org depth or the standing penalty is set to the consortium so anybody the consortium will see this in find so setting to two it will not apply to my direct system members

In branch one and sub library as a system, in this example my patron in branch one, or my sub library would not be held to this patron exceeds fines, but if the patron goes over to branch three which is outside of the system, they will, or, if I try to check out an item from branch three to this patron it will apply. We will take a look at that example.

I have again, if you remember from the consortium level our group penalty threshold exceeds fines is set to $10, our patron owes us $11. They are currently exceeding defined threshold. If we check out to this branch one patron at branch one with a branch one item, it is going to allow the checkout. If I tried to then check out a book from branch three which is outside of my system, it should stop us. Let's see. It is recognizing that and that branch one my patron is branch one but this is a branch three item therefore the patron should be held to the exceeds fines penalty and should not be allowed to take it out. The same action would happen if we were to log out and log back in at branch three, ranch three would also stop to hold because it is outside of that ignore proximity rule.

Next, we hope will patron from one group to another and take a look at how that behaves. Let's go back and take a look at our group penalty threshold, and let's sculpt that back out, or my temperate patrons which is pretty common scenario, temporary patrons might have two present documentations to you, lack of better word, prove they will bring your materials back so I told him he might have a lower threshold for them and what you might have for your other patrons.

In this scenario our temperate patrons are only allowed to check out two items, were as everybody else can only have 10 items in this scenario.

We are going to check out to my temporary patron, the temporary patron already has two items checked out. If now they are in good graces with you, and you want to change their user group out to the normal patron, we are going to edit and give them a regular patron permission group at this point. It's still showing as penalty, we can shift and reload, but will stay, the penalty, once the penalty is on the patron it does not retroactively, when you change their patron type. If we try to check out to the patron it will let us know we have the maximum to customer what we need to do in this case since we have given Norma different profile we need to go into her messages and we can either, I forgot to mention, you can either completely remove the penalty within the messages interface, modify the penalty or archive the penalty and this is the only interface where you can archive so going back to the topic of the alert message in the edit interface if you need to maintain them but you are getting out of the interface you need to place them into the messages and archive from there, there is no mechanism to archive them from their respective interfaces. There is a current consolidation project underway to consolidate all the notes alerts and messages into one interface, I have the reference on the PowerPoint and I encourage you to go in and take a look at it. I will mention, it takes the alert message off the patron edit and that's a very helpful feature when you are registering patrons. I encourage you to take a look at that development and explore it and provide your feedback, community feedback would be as much needed. It would be beneficial.

Going back to the workflow of changing Norma's patron type, we need to remove the penalty now that it doesn't apply to her.

Now we can continue our checkout to the next limit which would be 10 at that consortium level.

That's how you clear that out. Along the same lines, let's, take a look at those group penalties.

Sometimes when consortiums are just getting started or maybe the ideologies shift over time, they might start off with group penalties at the consortium level and overtime systems might be creating their own instead. There might be a bit of a limbo before the older libraries still looking at the consortium level versus the new libraries using system, or, you might decide to scope between patron and users might put some staff members and limbo with accounts of humor if you have a consortium level, you wouldn't want to come in here and deleted. There are other interfaces in Evergreen where it is associated with the patron or an item that asks you are you sure you want to do that, the group penalty threshold does not function that way. Let's take a look

>> Michelle has a couple quick questions -- will that penalty ever go away now that the patron's profile has been changed, or will it stay until it is manually removed?

>> It will stay until it is removed, it does not retroactively go away.

It might go away after you check everything in. That's something to test, because by then when you check everything in the penalty is essentially removed at that time too so it starts fresh. That's still the act of removing the penalty though, just in a different form.

Was there another question?

>> No that was it -- although do we have a link to that bug tracker? Assuming they mean, to the ticket and launchpad for that?

>> Which one?

>> He doesn't say, I will prompt you with a question if we followed up with more specific

>> There is a few in here, let's take a look, I feel like they are listed here.

Let's take a look at a patron who might have legacy thresholds on their account.

This patron owes us $20.40 in fines, they exceed the fine for threshold, if we come in and, it successfully deletes, it does not take the finds off the patients account, it might be, if you are looking at a library that has been using consortium level for years and you have hundreds of patrons who all bills or are over that threshold, that's something to consider if you are getting ready to remove the penalty, or adjuster penalties, there might be some additional reporting you might need to run and adjust those accounts, the billing, because, just removing penalty or adjusting the penalty does not automatically take it off patrons accounts.

That's something important to keep in mind.

We have time to take a look at a bug that April submitted, penalty threshold only applies to bills created by that org unit, let's take a look at that one. April if you're with us,

Let's take a look at that and see about.

We removed the consortium, that's okay, it would cash the scenario is library A, this goes back to when you set up your penalty, decide is that the contorted level, system-level, how systems interact, sometimes in a consortium environment you might be in a consortium but not resource sharing, is multiple factors there that come into play with how you determine how to set this up. The scenario is, library a has a maximum fine rule of $10, library B also does, but we have it set up at the system-level because maybe library C is allowed to have a max of three dollars. Consortium level setting would work in that case, and let's create two new group penalty thresholds.

We will create one at branch one, patron exceeds fines, give them $10. Loan creates another one, branch three a different system, we can see all of our descendants here, we have branch one and branch two, let's see. Let's go to this patron, and I had this set up if we had time, bear with me.

I was so nervous what about not having enough time,

We have Victor with us, we are going to Bill the patron and give him an annual billing of $11, and they are hitting the threshold of $11 at branch one

If Victor goes to branch three additive system, you're going to logout, and Victor is now in branch three. Password reset!

Now if we check out at branch three, the patron has the same fine threshold at the other system, that they've defined, however, when we go to check out the patron, we would need to bring their fine threshold up to that same $10 level at branch three. We would have to bill the client an additional $10

Scoping, standing penalty -- scoping the standing penalty out because it's still out for us does not make a difference, it is the group penalty threshold that is making that distinction. Causing the behavior.

Those are the examples I had, I apologize that I sped through it, I was concerned about having not enough time. I can open for any questions or community discussions amongst the group.

Are there any questions or anything you wanted to take a look at?

"When there is a group find for families how do you find connect members?" In Evergreen you cannot, so let's take a look her search for patron. In Evergreen patrons are autonomous, let's find another patron. do they owe us fines? They will in a second.

The fine generator is not on sandbox we have to do it this way.

When you have members grouped together, you can see -- the group fine, that's new. If you go into bills, you can't pay the groups fines. You would need to display the group member details, and go into the account to pay the balance, is not away from Alvin's account to pay the 20 that Stephen owes. You can view it, this is little bit different, it used to be --

You can commit to group member details, but from the billing interface within the primary account is no way to pay the $20 because they are grouped but still autonomous of each other.

Some of our legacy messages have the type "grocery"

During migration any billing that came over from your legacy system has to be applied manually, and that's what grocery means, the old-school definition of manual, same thing when you build patron

The type of circulation here, that means Evergreen automatically applied the billing so that's the difference between the terminology. When you see grocery that means somebody came in and manually applied it. It used to be visible to the patrons, so you will get patrons asking why the owe you $20 in groceries. That's been removed and you can come in and adjust your columns and not have to see it but that's what grocery means when you encounter it.

Rightly says I thought it was a pay for your high into the can of food, you can actually, but underpayment type goods, so for libraries that do canned food drives you, payment type can be accepted, it's different from the type of billing being charged is the payment type goods, but some libraries actually used the canned food drive for payment.

I wouldn't mention to patrons the old grocery bills but it's good that it's removed from the OPAC

Yeah, more of a bundled grouping, evergreen, there is no intention of breaking up that autonomy of individual patrons.

With migrations we do assign bills as groceries because we don't have circulation to attach to that, that's a good point.

Work probably needs to be discussed at some point. I have you used some libraries using work, I don't know how you quantify what the payment would be though.

Josh, Blake wrote a script to recalculate fines based on penalties.

The link that he gave.

Libraries don't usually-- okay.

Does anyone have any questions about standing penalties, or group penalty thresholds?

April, does anyone know if there's currently a Wish List bug for penalties applying to grouped accounts? I have not seen that going through the bugs, doesn't mean there's no one out there but I haven't seen that

How would you envision that working with patrons being autonomous?

Right, that would make sense, in legacy, those legacies still don't have, if you come from a system designed for schools for example, and they are designed where it is a teacher with a grouping of students together at the example where they are not autonomous of each other, yeah, I can see that.

Michelle wants to mention, this bug let's take a look at it

That has been a topic of discussion, you can go in, I know this refers to more out of block structure but you can go in and your standing penalties or maybe on the back and. Rename it on the backend. You can alternatively set it to where it is labeled but a block and renew is not a more helpful, there has been more discussion of that, where did I put that link? Please feel free to join in on the conversation on here, comments and discussions are welcome and launchpad. Look at the heat on that one!

April, workaround they do is they manually block group members.

Then you have to go back and unblock once the funds are paid.

May be a vision where, a group fine, now we lost our group fine, what happened?

Anybody know why that disappeared on us?

You are envisioning a penalty, attaching it there with the total load.

The label for staff CHR is confusing, and alternative would be to set up your different standing penalties and when you actually apply penalty to a patron for the block, instead of clicking block in writing a reason, to have your penalty types set up and have a workflow or staff numbers are using the drop-down.

Does Circ cover all checkouts and you need both in some cases? You can do, Fill is separate from Circ, it's recognizing the items on the hold shelf the particular sake patron is different from circ you want usable together but they are looking at it little bit different, fulfilling the hold is different from holding the circulation.

Are there questions? Or group discussions?

I would like to thank you all for joining us and I hope you found this helpful and helped explain some of the stuff you see in circulation. Thank you so much.

>>Thank you, Ericka, those great

There should be another program popping up here in just a moment folks, but I have to run so I hope everybody is having a great conference!

>> Thank you, Rogan, for moderating

>> next program in half an hour, presenter will be in here to be a slide practice

[End session]