KCLS Enhancements for Evergreen

Bill Erickson (Equinox Software), Matt Carlson & Jed Moffitt (King County Library System)

*Draft - Final version and additional information will be posted online at RSCEL.org and http://evergreen-ils.org/dokuwiki/doku.php?id=advocacy:presentations
KCLS Evergreen Timeline

*content will be added and posted with final version available online
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
This version of patron registration is all on 1 screen
You can limit the fields to those defined as required or select “Show All Fields”.
You can also define local help files that staff can access by selecting the magnifying glass icon.
That will display on the right-hand side of the screen
Maximizing screen real estate and information access
Maximum room for display of columns
Improved presentation of patron data in summary display
Improved presentation of patron data in summary display

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

The full Group Members display provides more information on group members and management options for the group.
Streamlining of Bills interface UI
Fines Payment History: Transactions
# Fines Payment History: Payments

![Fines Payment History: Payments](image)

<table>
<thead>
<tr>
<th>Amount</th>
<th>Payment ID</th>
<th>Note</th>
<th>Payment Date/Time</th>
<th>Payment Type</th>
<th>Payment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1.00</td>
<td>3</td>
<td></td>
<td>12/01/2023 03:00 PM</td>
<td>deposit</td>
<td>Paid</td>
</tr>
<tr>
<td>$1.00</td>
<td>4</td>
<td></td>
<td>12/01/2023 12:00 PM</td>
<td>deposit</td>
<td>Accepted</td>
</tr>
<tr>
<td>$1.00</td>
<td>5</td>
<td></td>
<td>12/01/2023 23:00 PM</td>
<td>deposit</td>
<td>Rejected</td>
</tr>
</tbody>
</table>

Note: The screenshot shows the payment history interface with a table displaying payment details, including the amount, payment ID, note, payment date/time, and payment status.
Staff client activity log

<table>
<thead>
<tr>
<th>Message</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>admin created 1193809789 to 2635224 (Unknown)</td>
<td>Sun Apr 04 2010 1:32:01Z (Eastern Daylight)</td>
</tr>
<tr>
<td>admin created 785795778 to 3255224 (Unknown)</td>
<td>Sun Apr 04 2010 1:32:01Z (Eastern Daylight)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Message</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most Recently Affected Patrons and Last Action for each</td>
<td></td>
</tr>
</tbody>
</table>
Staff client activity log

Recent staff actions, such as materials checked out

List of last patrons
Patron Merging/Deleting

*images and content provided with final version
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
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

<table>
<thead>
<tr>
<th>Name</th>
<th>Owner</th>
<th>Preserve Specification</th>
<th>Replace Specification</th>
<th>Add Specification</th>
<th>Remove Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merge: Add Subjects</td>
<td>CONS</td>
<td>00</td>
<td>600.050</td>
<td>600.060</td>
<td>841,842,843,844,845,850,852</td>
</tr>
<tr>
<td>Merge: Replace Subjects</td>
<td>CONS</td>
<td>600.050</td>
<td></td>
<td>600.060</td>
<td></td>
</tr>
<tr>
<td>Overlay: Drop Holdings</td>
<td>CONS</td>
<td>600.050</td>
<td></td>
<td>600.060</td>
<td></td>
</tr>
<tr>
<td>Overlay: Keep Subjects</td>
<td>CONS</td>
<td>600.050</td>
<td></td>
<td>600.060</td>
<td></td>
</tr>
</tbody>
</table>
MARC Import Profiles
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