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://evergreenils.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

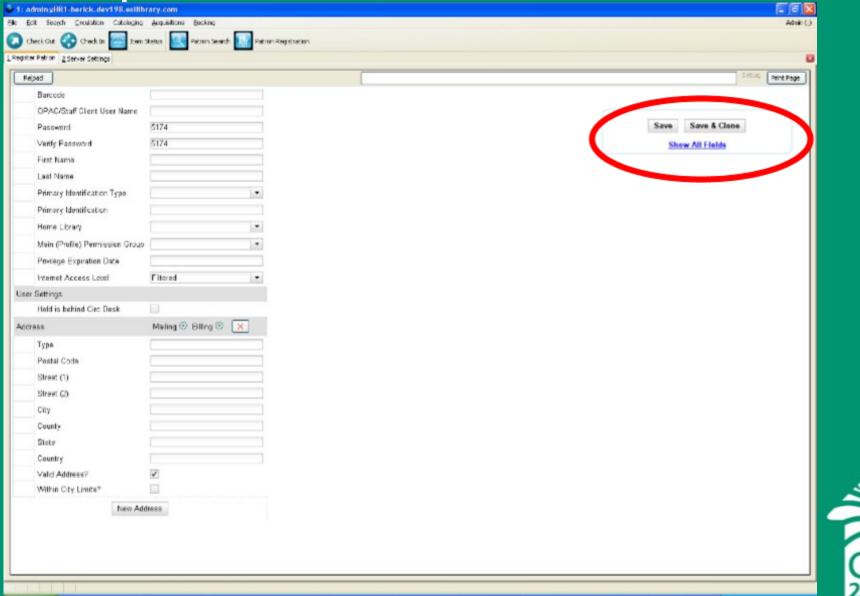
- Creating a single tab thru form
- Add field specific help files
- Providing the ability to auto fill City/State based on ZIP code
- Alerts and UI for pending addresses



This version of patron registration is all on 1 screen

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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

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Improved presentation of patron data in summary display

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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

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Group Options

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balance info with options to retrieve the record in another tab.

Group Options

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



Streamlining of Bills interface UI

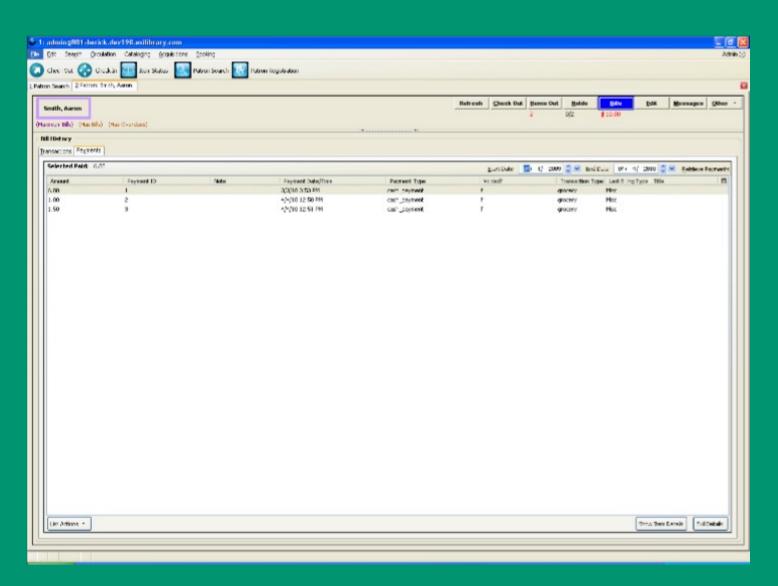
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Fines Payment History: Payments





Staff client activity log

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Staff client activity log

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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

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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

