25th Anniversary

IUG2017

NATIONAL HARBOR | MARYLAND

25TH ANNUAL INNOVATIVE USERS GROUP CONFERENCE

APRIL 2-5, 2017

Customized Online Patron Registration

Using eCard from the Quipu Group!

Customized Online Patron Registration Using eCard from the Quipu Group!

Coordinator:

Eeva Stierwalt, London Public Library

Presenters:

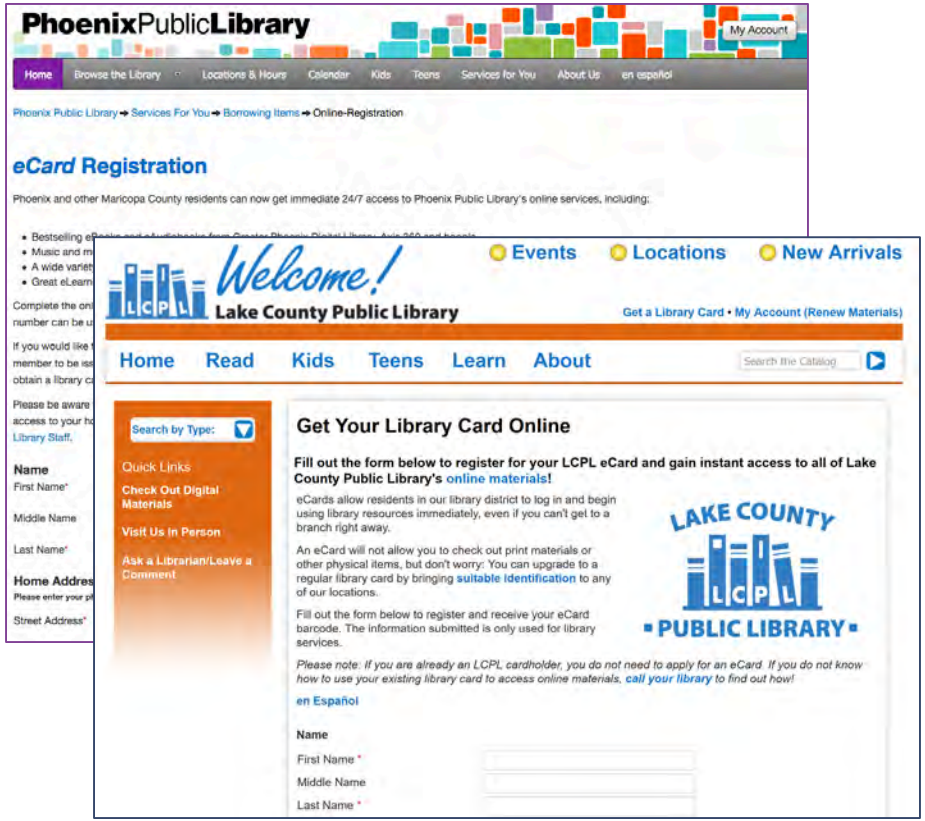
- Robert Anderson, Quipu Group LLC
- Jill Henriksen, Pierce County Library
- Cathy Bartel, Toledo Lucas County Public Library
- Casey Gabehart, Sno-Isle Libraries
- Carolyn Bly, Sno-Isle Libraries

quipu group llc
services, products and consulting

Quipu Group - eCARD

Patron Self Registration

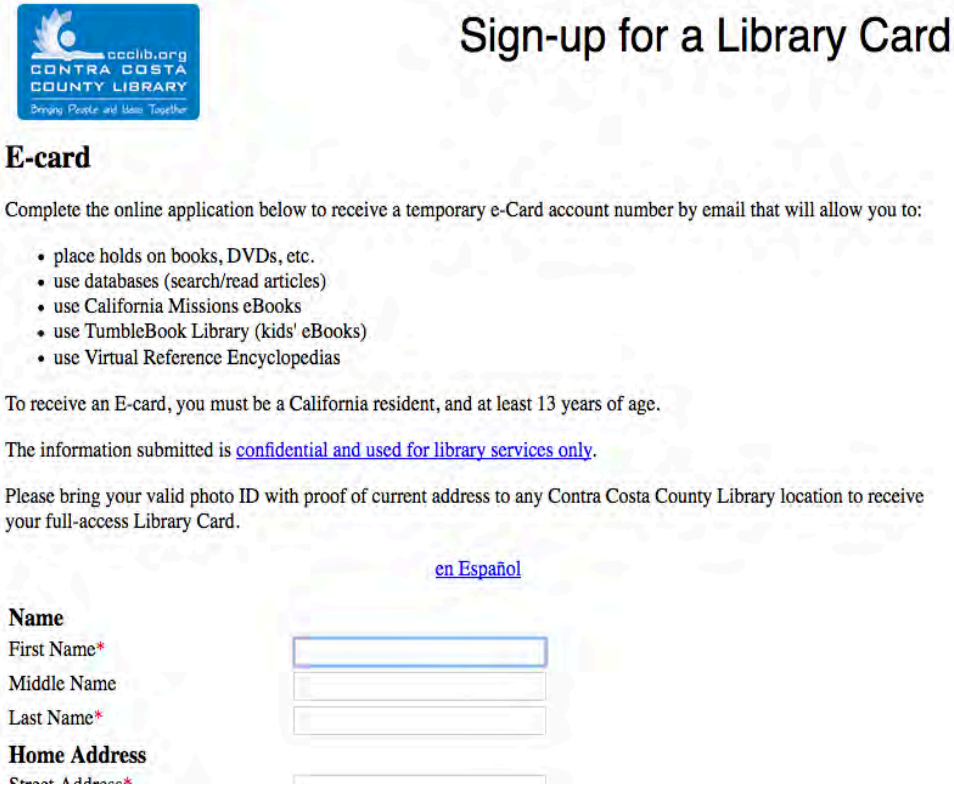
What is it?



Patron Self Registration that –

- **Replaces/enhances** the library's current online registration process.
- **Determines eligibility** by address, name, age and other customized factors.
- **Tailored** to library's residency requirements, registration policies, special requirements and ILS record creation.
- **Integrates into** library's current web site.

History



ccclib.org
CONTRA COSTA COUNTY LIBRARY
Bringing People and Ideas Together

Sign-up for a Library Card

E-card

Complete the online application below to receive a temporary e-Card account number by email that will allow you to:

- place holds on books, DVDs, etc.
- use databases (search/read articles)
- use California Missions eBooks
- use TumbleBook Library (kids' eBooks)
- use Virtual Reference Encyclopedias

To receive an E-card, you must be a California resident, and at least 13 years of age.

The information submitted is confidential and used for library services only.

Please bring your valid photo ID with proof of current address to any Contra Costa County Library location to receive your full-access Library Card.

en Español

Name

First Name*

Middle Name

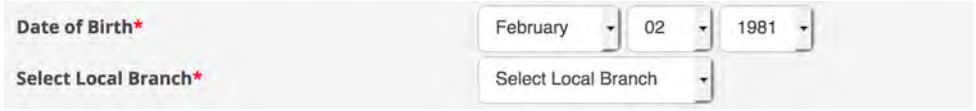
Last Name*

Home Address

- Developed in 2006 for Contra Costa County Library
- Offer online registration with “due-diligence” to satisfy database vendor contracts.
- Limit registrations to Contra Costa County residents.

Form Fields

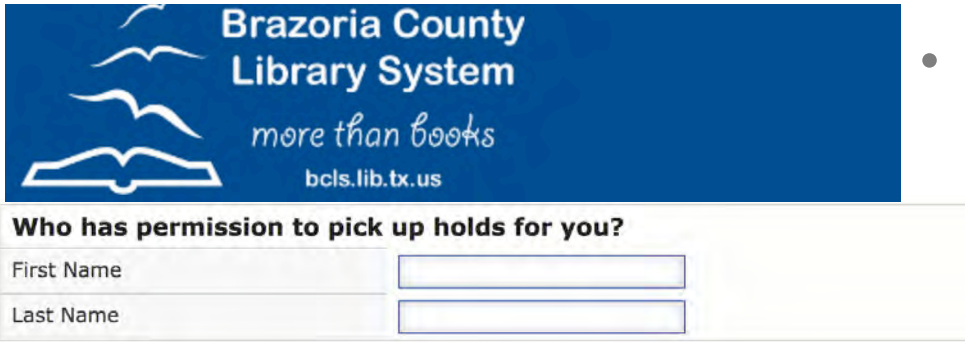
Adult



Juvenile

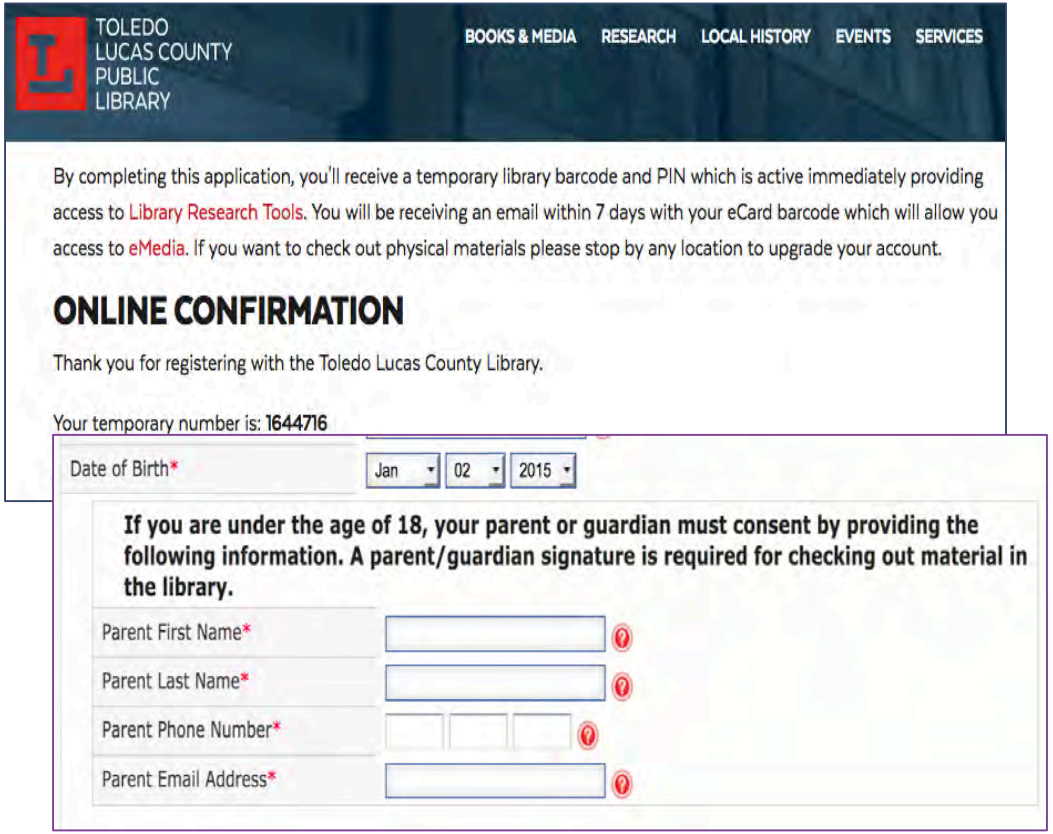
- Registration Fields can be added/removed, required/not-required depending on:
  - What information your library collects
  - If patron is registering online or inside the library
  - Age of the patron (Guardian section)
  - Other factors

Additional Data



- Can use 3rd party data to further qualify/categorize patron.
- Data can be collected that ILS registration process may or may not handle.
  - Reciprocal, Alternate ID, Voter Registration
- Can collect non-ILS data for reporting via eCARD Admin.
  - Newsletters, Friends of the Library requests.

Patron Communication



- Online and Inside Library confirmations
- Email confirmations based on patron registration location and type.
- Alerts and messages to help patron through the process
- Further patron communication through eCARD Admin

ILS, Languages, Addresses & Future

- Works with all major ILS registration processes
- Multiple Language support – English, Spanish, Chinese, …..
- Addresses validated for U.S. and Canada (other countries upon request)
- Service areas tailored to library
- Online Renewal (Polaris)

quipu group llc
services, products and consulting

http://quipugroup.com
thefolks@quipugroup.com
800-764-8018

PITS
Library Patron Incident Tracking System

eCARD
Online Library Card Patron Registration

ePASS
Library Patron Museum & Venue Pass Reservations

Consulting
ILS & Technology Solutions

Full presentation online
https://innovativeusers.org/conferences

Pierce County Library

Jill Henriksen

eCard

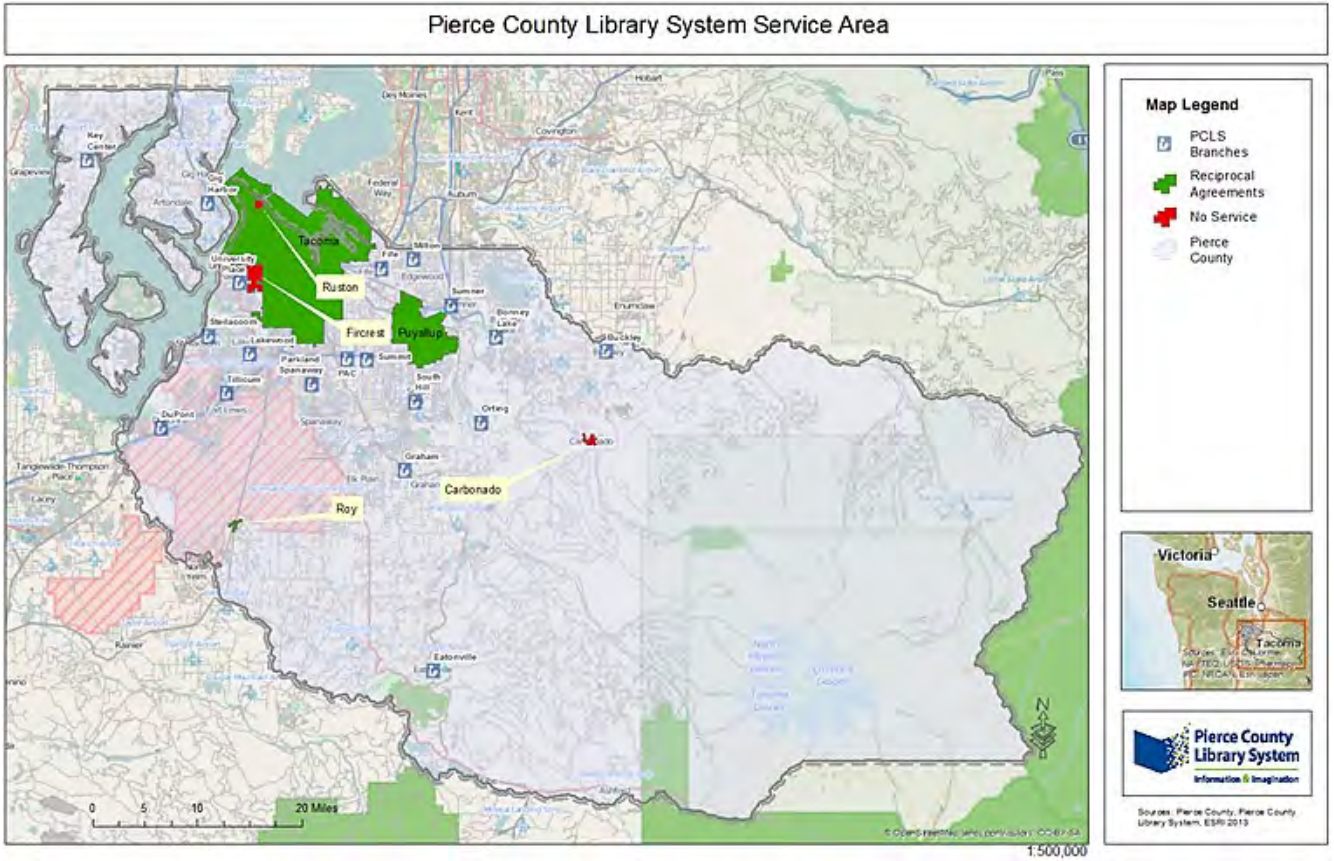
Implementation-Why we selected eCard

Pierce County Library System
Information & Imagination

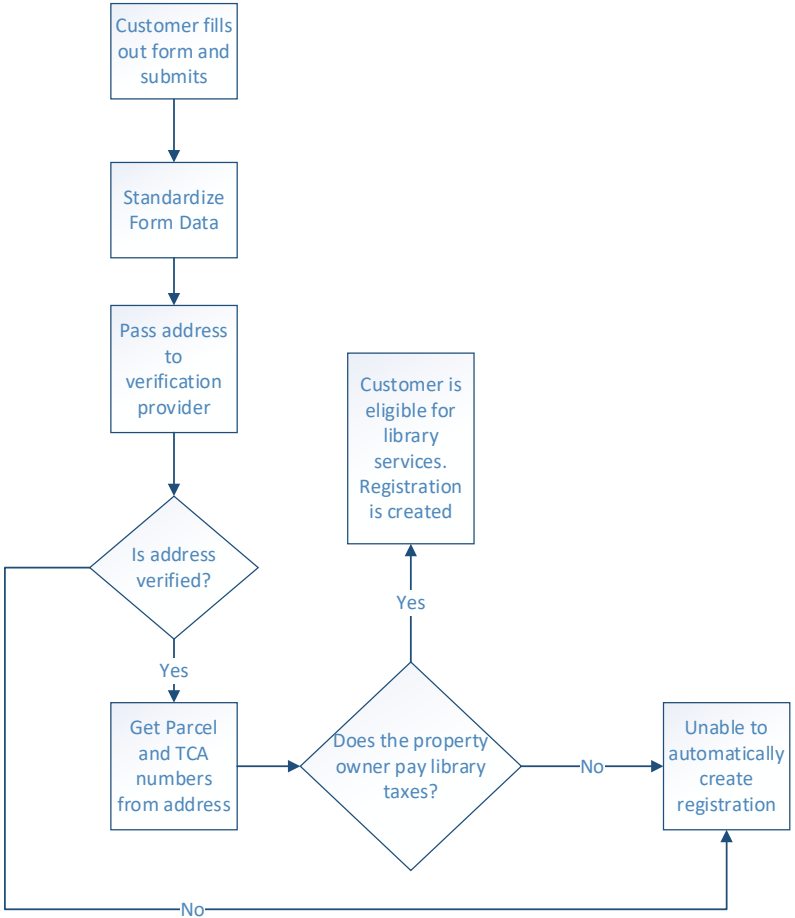
- We wanted eligible customers to be able to register online and use our online services
  - Originally used Polaris' native online registration functionality
  - Needed a way to verify customers were in our service area
  - Reciprocal agreements
  - Joint Base Lewis-McChord
- Accurate patron data
  - More efficient registration
  - Accurate in-branch registration process
  - Reporting challenges
  - Too much time spent cleaning up messy data

It’s complicated

Pierce County Library System
Information & Imagination



How it works


Customer fills out form and submits
Standardize Form Data
Pass address to verification provider
Is address verified?
Yes
No
Get Parcel and TCA numbers from address
Does the property owner pay library taxes?
Yes
No
Customer is eligible for library services. Registration is created
Unable to automatically create registration

Issues that still keep us up at night

Pierce County Library System
Information & Imagination

- Not all addresses will have a match
  - Addresses from new developments may not be in county database yet
  - Rural/small town street addresses not in USPS database
- Manual registration updates by staff
  - GRRRR!

Benefits to using eCard

Pierce County Library System
Information & Imagination

- Better data for reports and notifications
  - Addresses, phone numbers and email addresses formatted correctly
  - Marketing/fund raising (UDF - How did you find out?)
  - Target mailings to voters
- Saves staff time and better for customers because
  - Correct notification choices made (limiting to email or phone only)
  - UMS reporting is more accurate
  - Better duplication detection (customizable)

Pierce County Library

Jill Henriksen

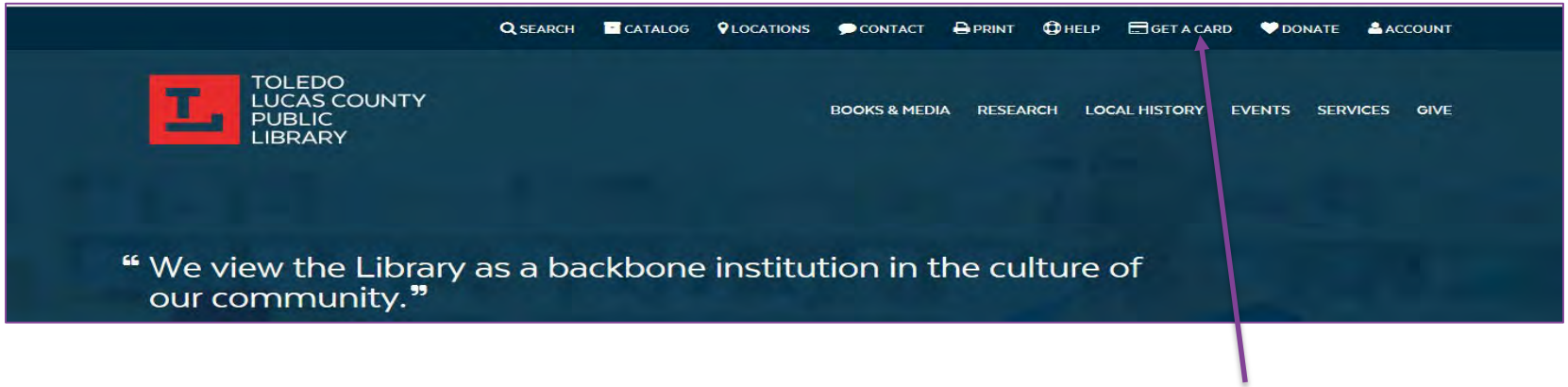
JHenriksen@piercecountylibrary.org

Toledo Lucas County Public Library

Cathy Bartel

eMedia Access

Toledo Lucas County Public Library



Online Registration for eMedia Access without visiting the library

- **Works with** the library’s current online registration process through Sierra
- **Determines eligibility** by address. All Ohio residents are eligible for cards because we receive a significant portion of our operating budget through the state of Ohio.

Email Communication

Hablas Español?

By completing this application, you'll receive a temporary library barcode and PIN which is active immediately providing access to Library Research Tools. You will be receiving an email within 7 days with your eCard barcode which will allow you access to eMedia. If you want to check out physical materials please stop by any location to upgrade your account.

ONLINE CONFIRMATION

Thank you for registering with the Toledo Lucas County Library.

Your temporary number is: **1648826**

Your Pin Number is: 1234

Click here to change your PIN #.

You will also receive a confirmation email with your Library card number at the email address you provided. **If the confirmation email does not arrive please check your spam folder.**

You will be automatically subscribed to our new customer newsletter. When you receive your first welcome email, there will be an unsubscribe link at the bottom of the email.

To find out more information about what library services are available to you visit ToledoLibrary.org

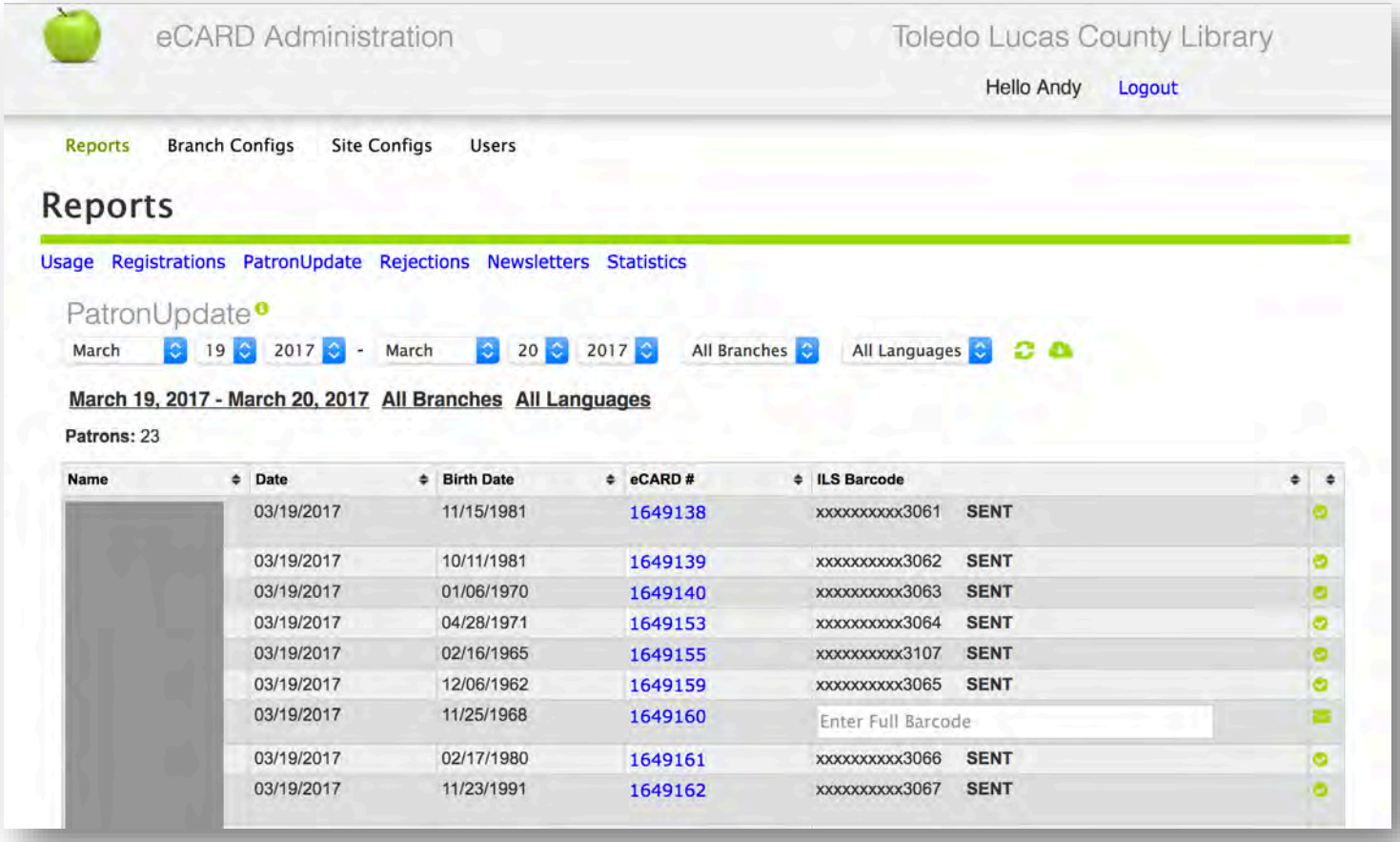
TOLEDO LUCAS COUNTY PUBLIC LIBRARY

CONNECT WITH US

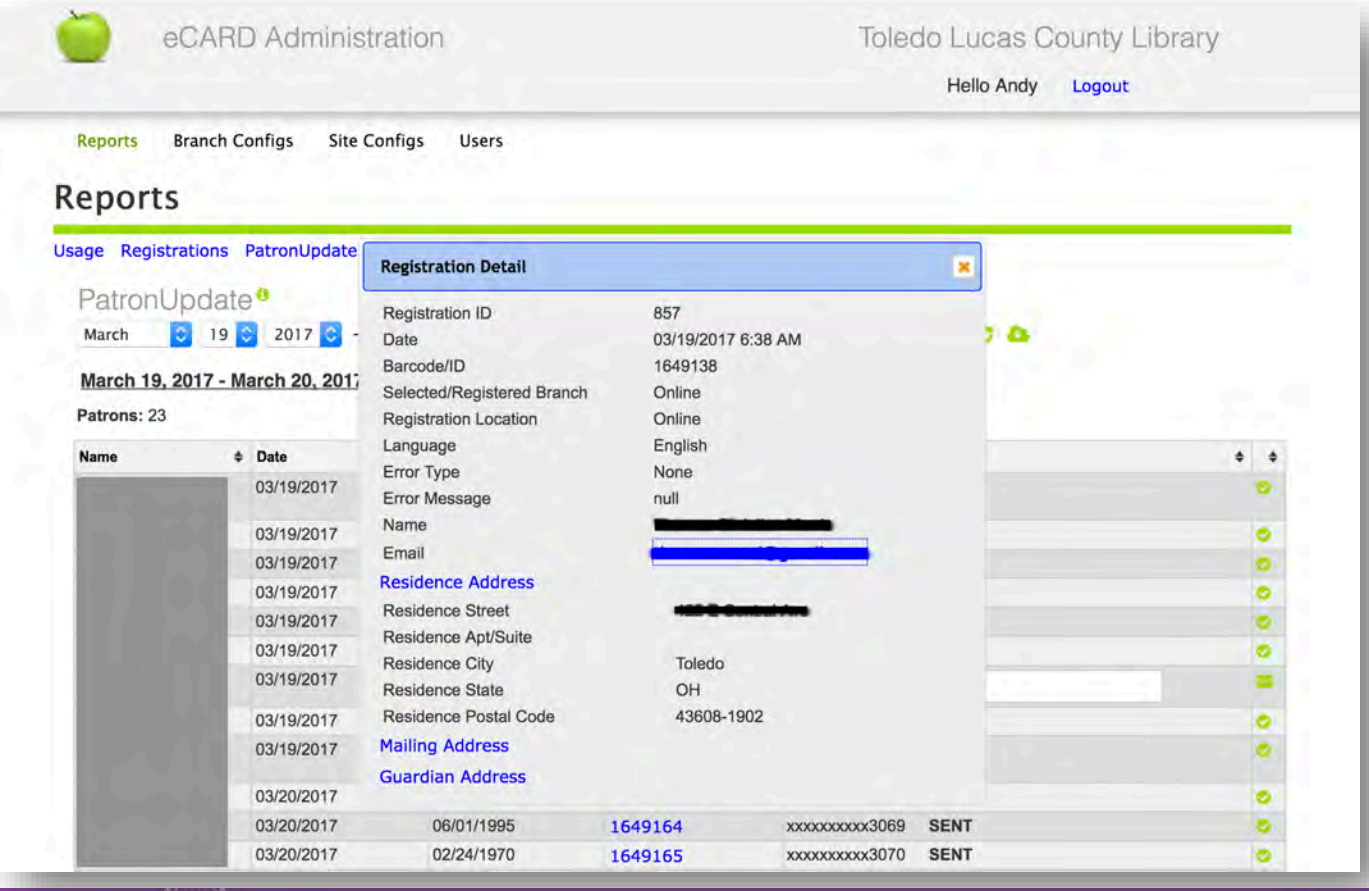
SEARCH
CATALOG
LOCATIONS

- **Automatic email response** allows database access and customer can reserve materials.

Patron Update



Additional Data



We use the **registration detail** to check for duplicate accounts and make updates to existing accounts in Sierra.

Patron Communication

Dear Karen,

Welcome to the Toledo Lucas County Public Library.

This is your new eMedia card number: **5000231224**
This replaces your temporary card number. Your PIN Number remains the same, but you can change it in MY ACCOUNT.

With your eMedia card you can stream and download eBooks, eAudiobooks, eMagazines, music and movies from our website at your convenience. Find the new bestsellers, popular music, or the latest issue of your favorite magazines. There are no fines and no bills for lost materials.

If you wish to borrow physical materials from our Main Library or one of our 19 branch locations, you will need to visit us with a valid picture ID and complete an application.

Let's get started: eMedia Collections

Visit often!

- **Second email staff triggered** delivers the actual barcode and the ability to access eMedia platforms.

Registrations from all over the state

Week #1

- Cleveland
- Cincinnati
- Youngstown
- Gahanna
- Findlay
- Shaker Heights
- Xenia
- St. Martin
- and more

Toledo Lucas County Public Library

Cathy Bartel

cathy.bartel@toledolibrary.org

SNO-ISLE LIBRARIES

Sno-Isle Libraries

Carolyn Bly
Casey Gabehart

eCard

Introduction

- Two counties covering 2,260 square miles
- Serving 728,745 residents through 22 community libraries, online services and Library on Wheels
- Residents in Washington State are eligible for a library card with Sno-Isle Libraries if they pay for library service via their property taxes

Why

- Customers have easy access to our databases and the ability to place holds while browsing in the library and at home
- Standardize our address information
- Accurately auto fill statistical information for future statistics

Implementation

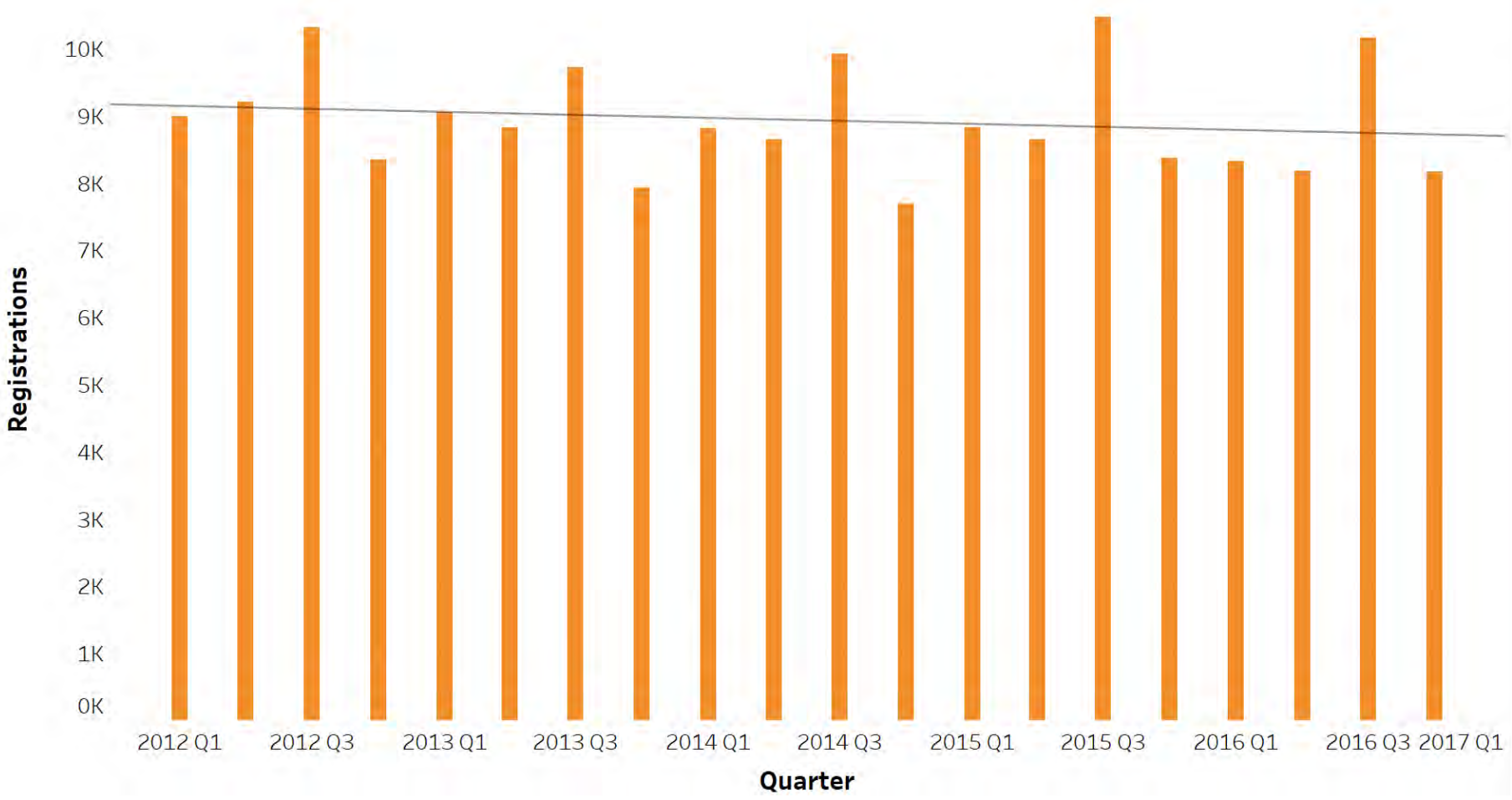
- Contacts USPS
- Contacts Assessor’s Office
- Verify information
- Sets statistical fields in Polaris (Res/NRES, Stat Class)
- Standardizes Input
- Checks for Qualified Cities

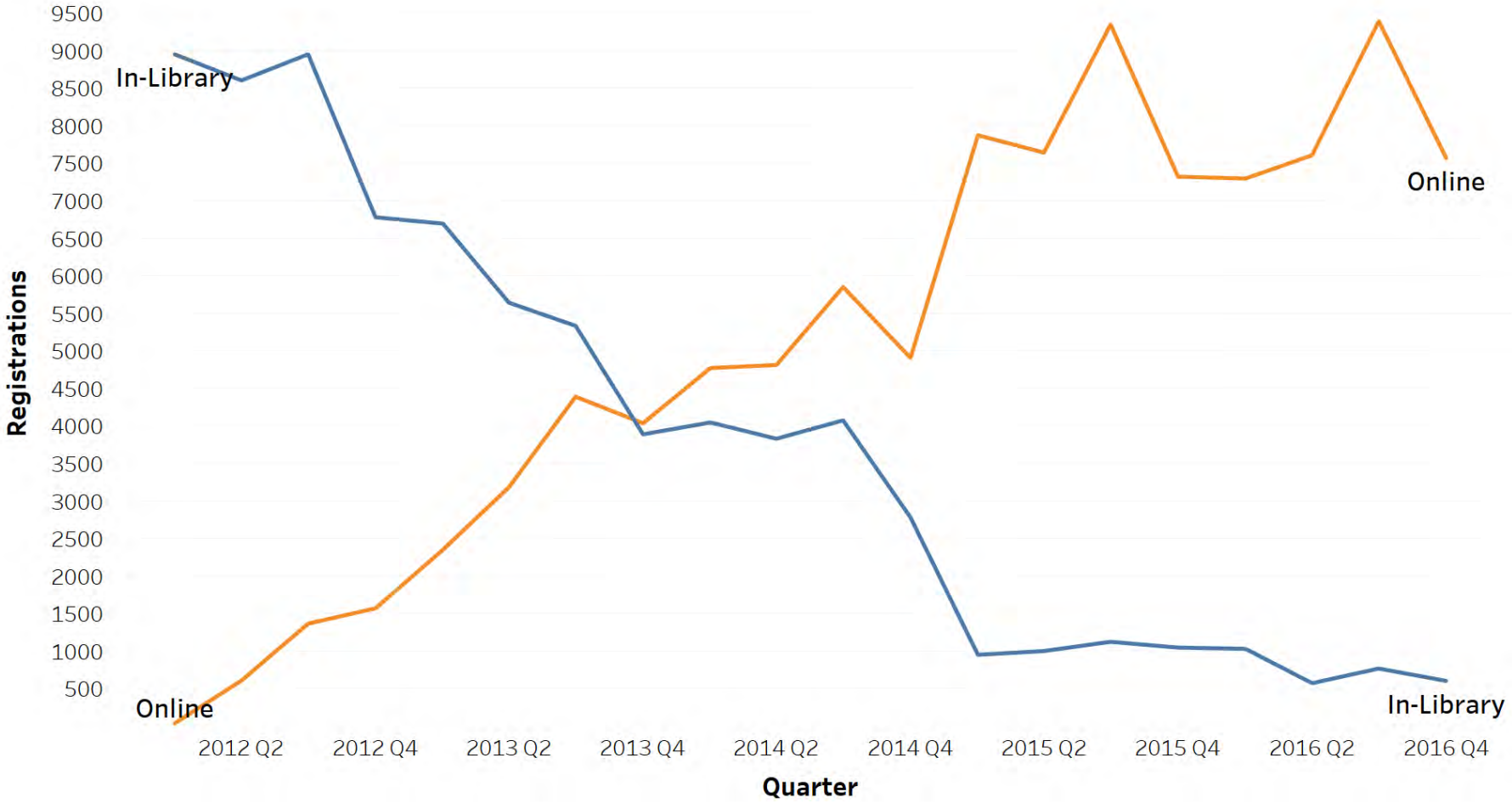
Operationalization

- When do staff input registrations manually?
  - Network and Power outages
  - Customer comfort level
- What are some of the drawbacks?
  - Cloning of family members
  - Assessor’s office not updating website
- What are some of the benefits?
  - Customers time with staff
  - Community Library Staff time

Data Scrub

- Performed a “Scrub” of our records in August, 2015
  - Processed **325,804** records
  - Successfully updated **307,111** records
  - Unable to automatically process 18,451 (5.6% fail rate)
    - Added a bulk note to customers accounts for staff
    - ~10,000 of these records have not been updated (inactive borrowers)


Registrations
10K
9K
8K
7K
6K
5K
4K
3K
2K
1K
0K
2012 Q1
2012 Q3
2013 Q1
2013 Q3
2014 Q1
2014 Q3
2015 Q1
2015 Q3
2016 Q1
2016 Q3
2017 Q1
Quarter


9500
9000
8500
8000
7500
7000
6500
6000
5500
5000
4500
4000
3500
3000
2500
2000
1500
1000
500
Registrations
In-Library
Online
Online
In-Library
2012 Q2
2012 Q4
2013 Q2
2013 Q4
2014 Q2
2014 Q4
2015 Q2
2015 Q4
2016 Q2
2016 Q4
Quarter

SNO-ISLE LIBRARIES

Carolyn Bly

cbly@sno-isle.org

Casey Gabehart

cgabehart@sno-isle.org

London Public Library

Eeva Stierwalt

eAccount

London Public Library

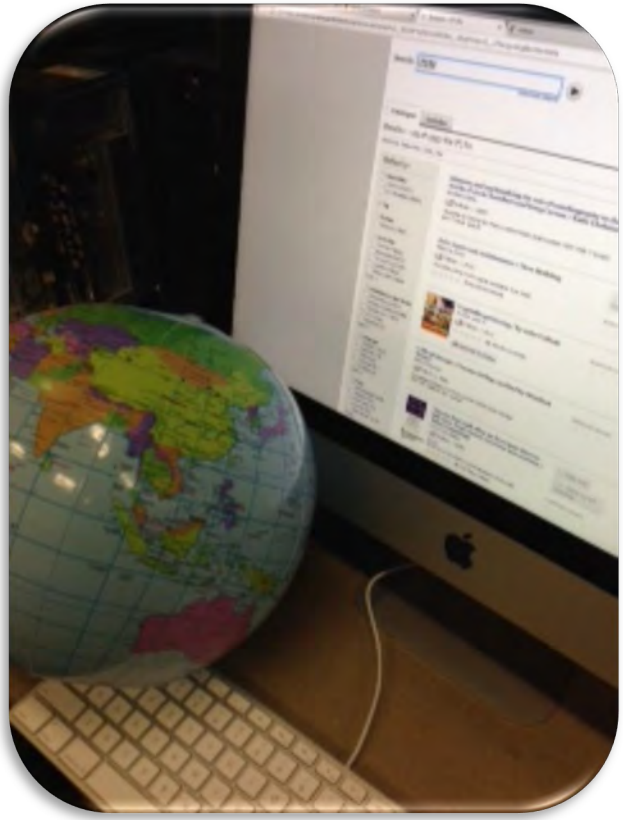
- Population: 380,000
- Active patrons: 166,396
- Libraries/branches: 16
- Annual circ: 3.7 million
- Volumes: 868,000

eAccount History

- Implemented 2008 for Program Registration
- Millennium and Sierra ‘Self Registration’ Product (selfreg)
- LPL’s eAccount goes Global!!!

Forced to restrict it to:

- Program Registration
- Some Online Databases
- 3 month expiry date



New eAccount at LPL Launched Feb. 16

- New webpage/url with new form
- 3 year expiry date
- Access on-line resources
  - Excepting Hoopla
- Register for programs
- Borrow OverDrive eMaterials
- eAccount patrons must live in London and reciprocal borrowing areas
- Canadian Anti-Spam Legislation

The New eAccount with eCard Implementation

What makes us unique?

- Use of Sierra “selfreg” product
  - Limited # of fields to populate
  - Shortened barcode#
  - Uses Patron Record Template (default Ptype, Expiry date, Home Library, for eAccount)
  - Daily manual update of Expiry Date in record template
- Specific formatting of key fields, such as Address
- Date of Birth ‘dd-mm’ and no year
- No logging
- Canadian Postal Codes

Canadian Postal Codes

Format example: N6A 6H9

N = Western Ontario

6 = London

A = North

6H9 = Specific city block/side of street, exact building, several houses, or a rural community

eAccount Tweaks after Implementation

- Removal of all links to old url address (old form)
- Removal of selfreg.html ‘form’ content
- Blocking on:
  - Bogus email addresses (invalid/unverified domain, e.g.)
  - General ‘large volume receiver’ addresses (for a mall, building with no street number)
  - Business Addresses
  - IPs outside of Canada or US

Results

- 220 New eAccounts since Launch (Feb. 16)
- Reduced ‘Global’ Usage
- ‘On-line only’ patrons VERY HAPPY to have 3 year expiry!

London Public Library

Eeva Stierwalt

eeva.stierwalt@lpl.ca

THANK YOU!

Questions?