



**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!

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Presenters:

- Robert Anderson, Quipu Group LLC
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- 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.

The image shows two screenshots of a library website. The top screenshot is from Phoenix Public Library, showing a navigation menu and a section for eCard Registration. The bottom screenshot is from Lake County Public Library, showing a 'Get Your Library Card Online' form. The form includes fields for Name (First, Middle, Last), Home Address (Street), and a search bar. There are also links for 'Quick Links', 'Visit Us in Person', and 'Ask a Librarian/Leave a Comment'. A logo for Lake County Public Library is visible on the right side of the form.

Phoenix Public Library

Home Browse the Library Locations & Hours Calendar Kids Teens Services For You About Us en español

Phoenix Public Library → Services For You → Borrowing Items → Online-Registration

eCard Registration

Phoenix and other Maricopa County residents can now get immediate 24/7 access to Phoenix Public Library's online services, including:

- Bestselling eBooks
- Music and more
- A wide variety of audiobooks
- Great eLearning

Complete the online registration form and your library card number can be used to access online services.

If you would like to register as a new member to be able to use a library card, please contact your local library staff.

Please be aware that you must have access to your home computer to use the online registration process.

LCPL Lake County Public Library

Events Locations New Arrivals

Get a Library Card • My Account (Renew Materials)

Home Read Kids Teens Learn About

Search the Catalog

Search by Type:

Get Your Library Card Online

Fill out the form below to register for your LCPL eCard and gain instant access to all of Lake County Public Library's online materials!

eCards allow residents in our library district to log in and begin using library resources immediately, even if you can't get to a branch right away.

An eCard will not allow you to check out print materials or other physical items, but don't worry: You can upgrade to a regular library card by bringing suitable identification to any of our locations.

Fill out the form below to register and receive your eCard barcode. The information submitted is only used for library services.

Please note: if you are already an LCPL cardholder, you do not need to apply for an eCard. If you do not know how to use your existing library card to access online materials, call your library to find out how!

en Español

Name

First Name *

Middle Name

Last Name *



History

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

Street 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

Date of Birth* February 02 1981

Select Local Branch* Select Local Branch

Juvenile

Date of Birth* February 02 2009

If you are under the age of 17 you must have your guardian's consent and complete the following Parent/Guardian information.

First Name*

Last Name*

Telephone*

Email Address*

Same as Home Address. Leave this box checked if your guardian's address is the same as your home address.

Select Local Branch* Select Local Branch

Statement of Responsibility

- 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




Chattahoochee Valley Libraries
One Card...a World of Possibilities!

Other Information

Receive Library Newsletter Yes No

Are you Registered to Vote* Yes No

- 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.



Brazoria County Library System
more than books
bcls.lib.tx.us


Who has permission to pick up holds for you?

First Name

Last Name



Patron Communication



TOLEDO
LUCAS COUNTY
PUBLIC
LIBRARY

BOOKS & MEDIA RESEARCH LOCAL HISTORY EVENTS SERVICES

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: **1644716**

Date of Birth*

If you are under the age of 18, your parent or guardian must consent by providing the following information. A parent/guardian signature is required for checking out material in the library.

Parent First Name*	<input type="text"/>	
Parent Last Name*	<input type="text"/>	
Parent Phone Number*	<input type="text"/> <input type="text"/> <input type="text"/>	
Parent Email Address*	<input type="text"/>	

- 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



Houston Public Library

Linking YOU to The World

Todos los residentes de Texas son elegibles para una tarjeta gratuita de MY Link. Seleccione Sí para continuar. Si no es residente de Texas, seleccione no para ver cómo puede obtener una tarjeta MY Link.*

sí no

Nombre

Primer Nombre*

Segundo nombre

San Francisco Public Library

圖書證申請表

* = 必須填寫項目
請用英文填寫

名*:

中間名:

姓*:

駕照或身份證號碼:

電郵地址:

住所地址*:

市名*: San Francisco

州名*: California

電話: 請依照這格式輸入: XXX-XXX-XXXX

生日*: 請依照這格式輸入: 月日年 (月日各兩位數, 年四位數)

- 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
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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>



25th Anniversary

IUG2017

Pierce County Library

Jill Henriksen

eCard





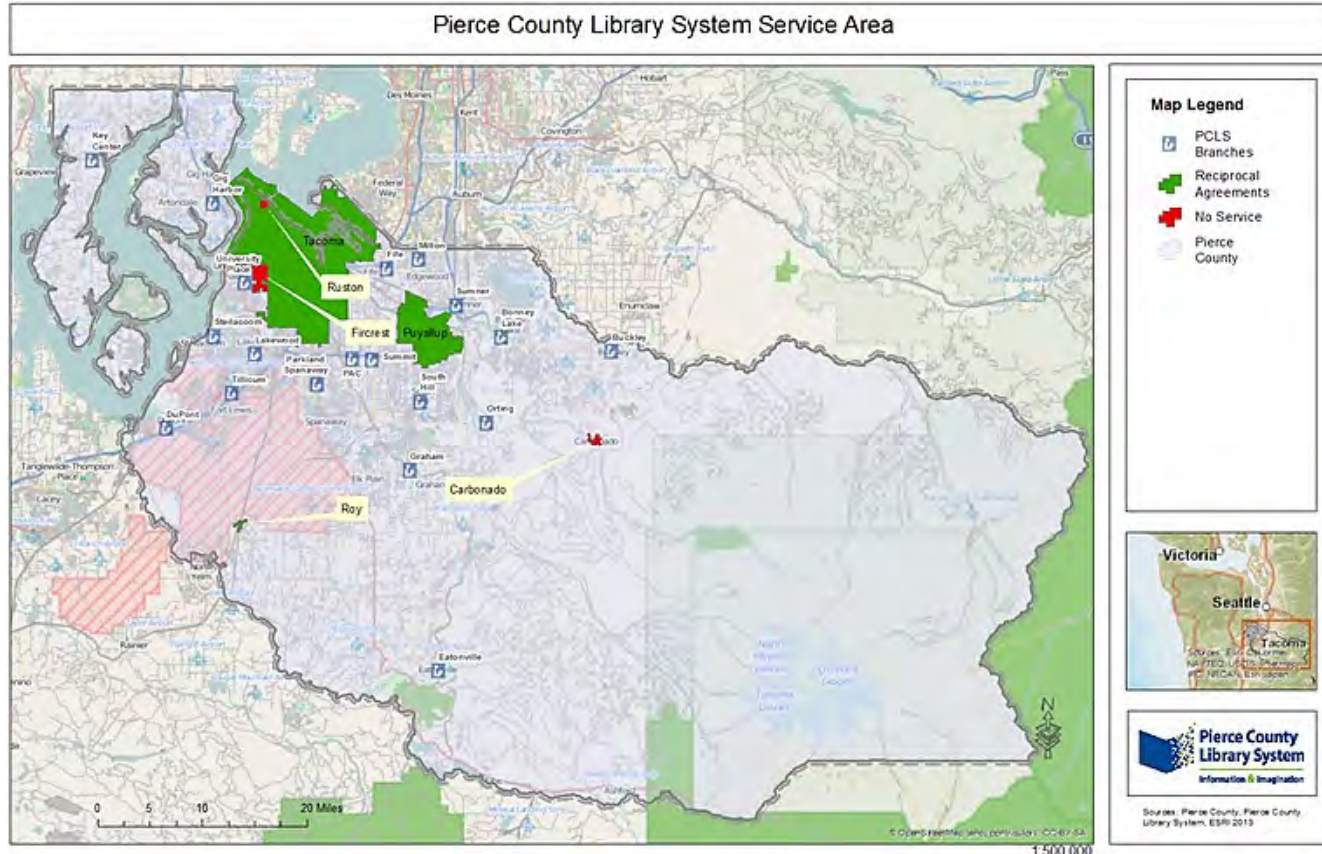
Implementation-Why we selected eCard

- 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

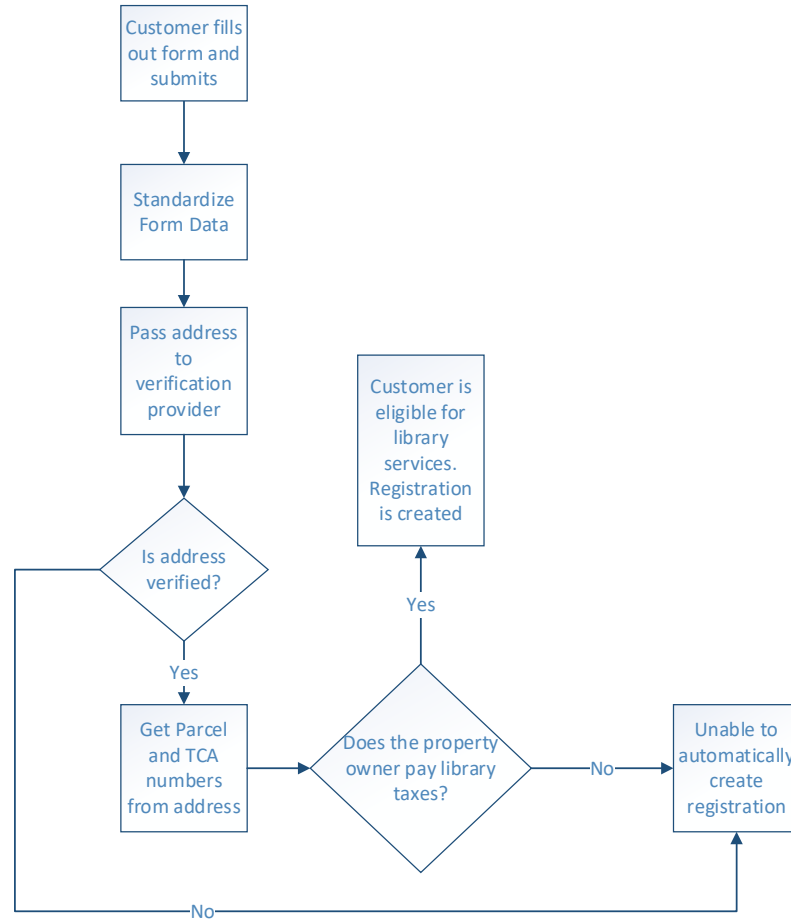




It's complicated



How it works





Issues that still keep us up at night

- 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

- 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



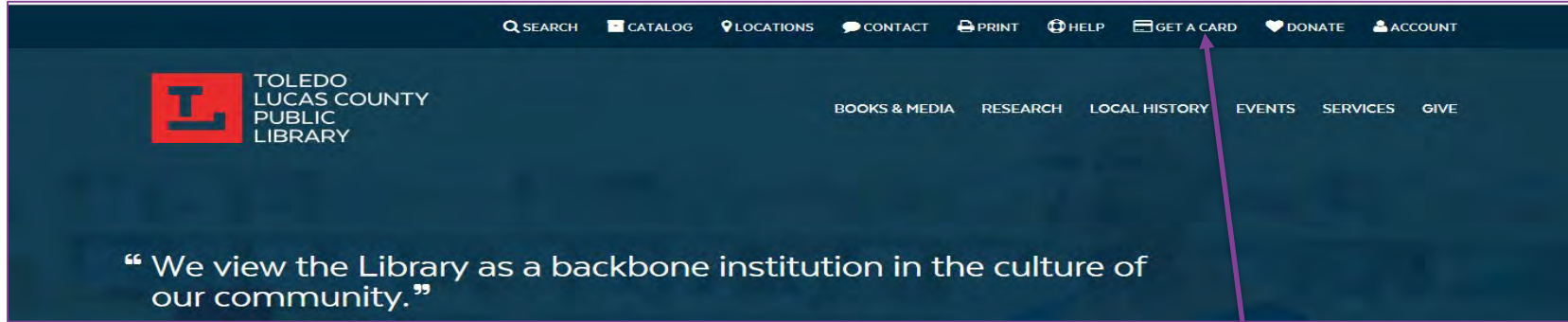
Toledo Lucas County Public Library

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



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



IUG2017

Patron Update



eCARD Administration

Toledo Lucas County Library

Hello Andy [Logout](#)

[Reports](#) [Branch Configs](#) [Site Configs](#) [Users](#)

Reports

[Usage](#) [Registrations](#) [PatronUpdate](#) [Rejections](#) [Newsletters](#) [Statistics](#)

PatronUpdate¹

March 19 2017 - March 20 2017 All Branches All Languages  

March 19, 2017 - March 20, 2017 All Branches All Languages

Patrons: 23

Name	Date	Birth Date	eCARD #	ILS Barcode		
	03/19/2017	11/15/1981	1649138	xxxxxxxxx3061	SENT	
	03/19/2017	10/11/1981	1649139	xxxxxxxxx3062	SENT	
	03/19/2017	01/06/1970	1649140	xxxxxxxxx3063	SENT	
	03/19/2017	04/28/1971	1649153	xxxxxxxxx3064	SENT	
	03/19/2017	02/16/1965	1649155	xxxxxxxxx3107	SENT	
	03/19/2017	12/06/1962	1649159	xxxxxxxxx3065	SENT	
	03/19/2017	11/25/1968	1649160	<input type="text" value="Enter Full Barcode"/>		
	03/19/2017	02/17/1980	1649161	xxxxxxxxx3066	SENT	
	03/19/2017	11/23/1991	1649162	xxxxxxxxx3067	SENT	



Additional Data



Reports

[Usage](#) [Registrations](#) [PatronUpdate](#)

PatronUpdate

March 19 2017

March 19, 2017 - March 20, 2017

Patrons: 23

Name	Date
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/19/2017
	03/20/2017
	03/20/2017
	03/20/2017

Registration Detail

Registration ID	857			
Date	03/19/2017 6:38 AM			
Barcode/ID	1649138			
Selected/Registered Branch	Online			
Registration Location	Online			
Language	English			
Error Type	None			
Error Message	null			
Name	[REDACTED]			
Email	[REDACTED]			
Residence Address				
Residence Street	[REDACTED]			
Residence Apt/Suite				
Residence City	Toledo			
Residence State	OH			
Residence Postal Code	43608-1902			
Mailing Address				
Guardian Address				
	06/01/1995	1649164	xxxxxxxx3069	SENT
	02/24/1970	1649165	xxxxxxxx3070	SENT

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

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





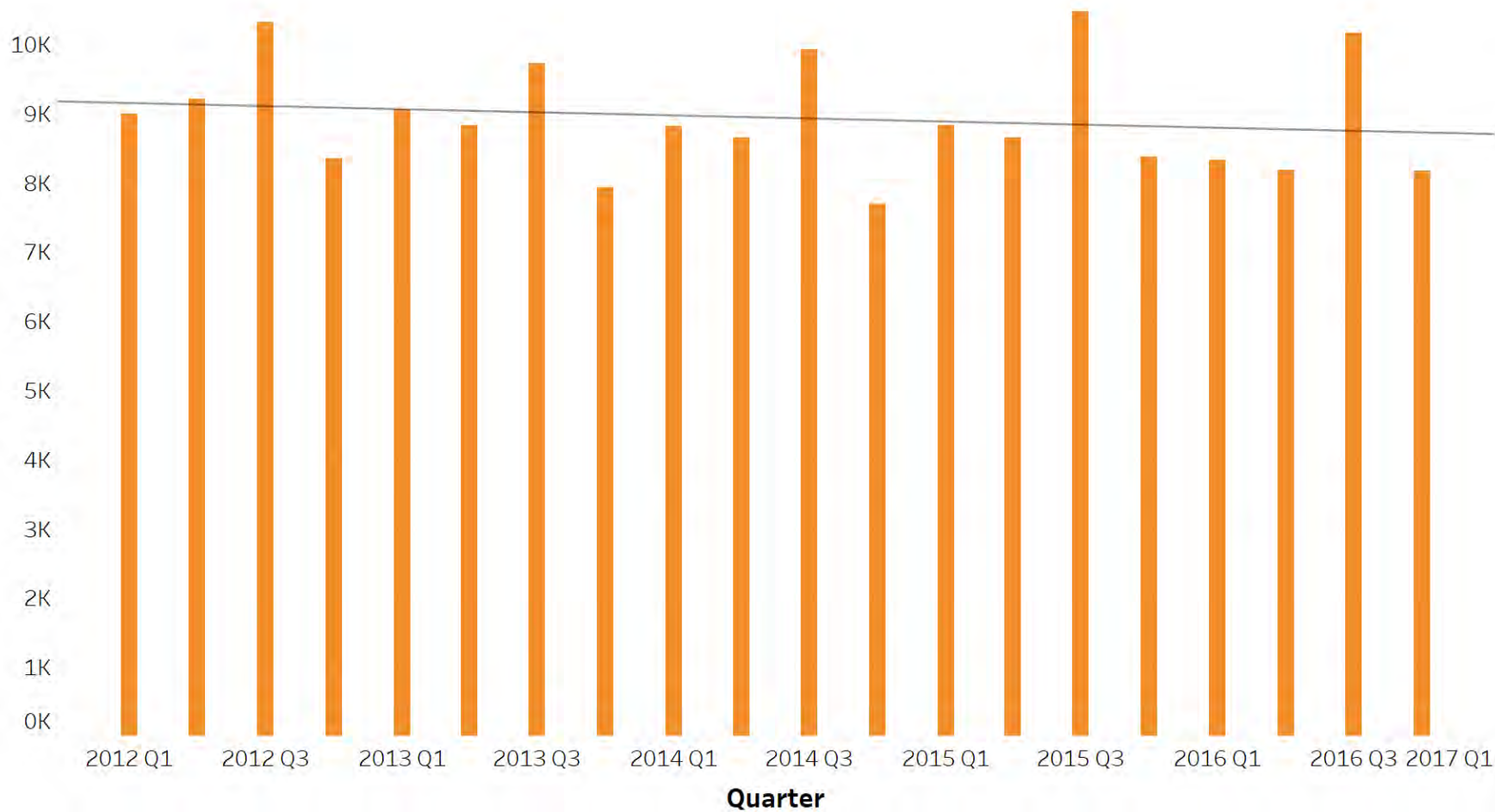
Data Scrub

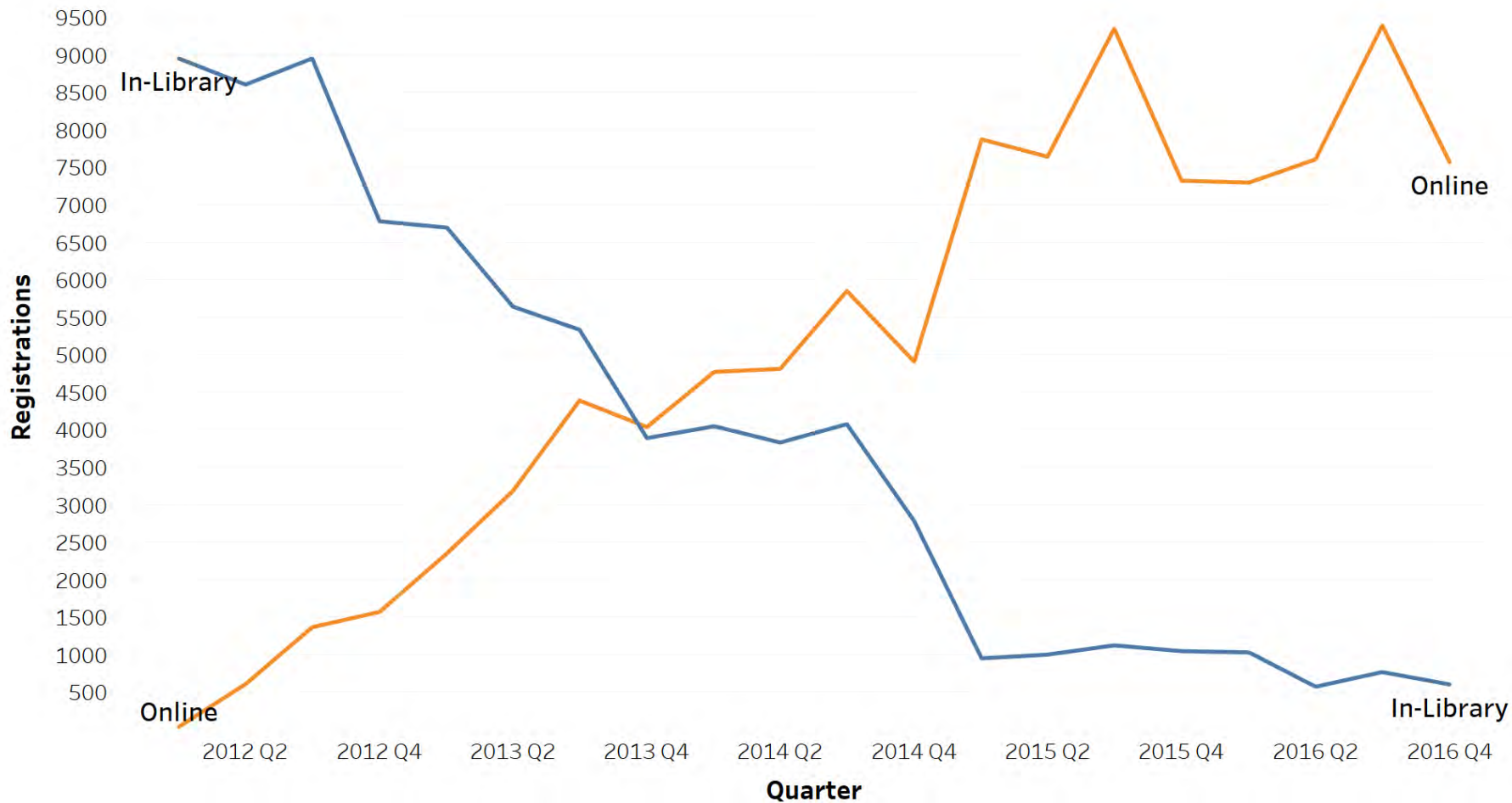
- Performed a “Scrub” of our records in August, 2015
 - Processed **325,804** records
 - Successfully updated **307,111** records
 - Unable to automatically process 18,451 (5.6% fail rate)
 - Added a bulk note to customers accounts for staff
 - ~10,000 of these records have not been updated (inactive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





Registrations







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

eAccounts for Online Resources

Using the Library's online resources is even easier with our new eAccount! For those who live in London and area, an eAccount gives you access to our online Library without a library card.

Register online for
Library Programs

Borrow **OverDrive eBooks**
and eAudiobooks

Learn with **Lynda.com**
online tutorials

Watch movies
with **InstantFlix**

Read newspapers from
around the world
with **PressReader**

Read **Zinio** magazines

Learn a language with
Mango Languages

Find information in
journals and magazines
in our **Databases**





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!





Eeva Stierwalt

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THANK YOU!

Questions?

