

# Patron Access Services Technical Group

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MARCH 17, 2022

**Put your name and library into the chat for meeting minutes.**

# Call to Order

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# Approval of minutes from last meeting

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Last meeting minutes from December 9, 2021

Motioned by

Seconded by

Added items

First Amendment Audits

Creating circulating classroom sets – identifying cataloging needs / plan for it / will set up conversation with YS librarians and catalogers too!

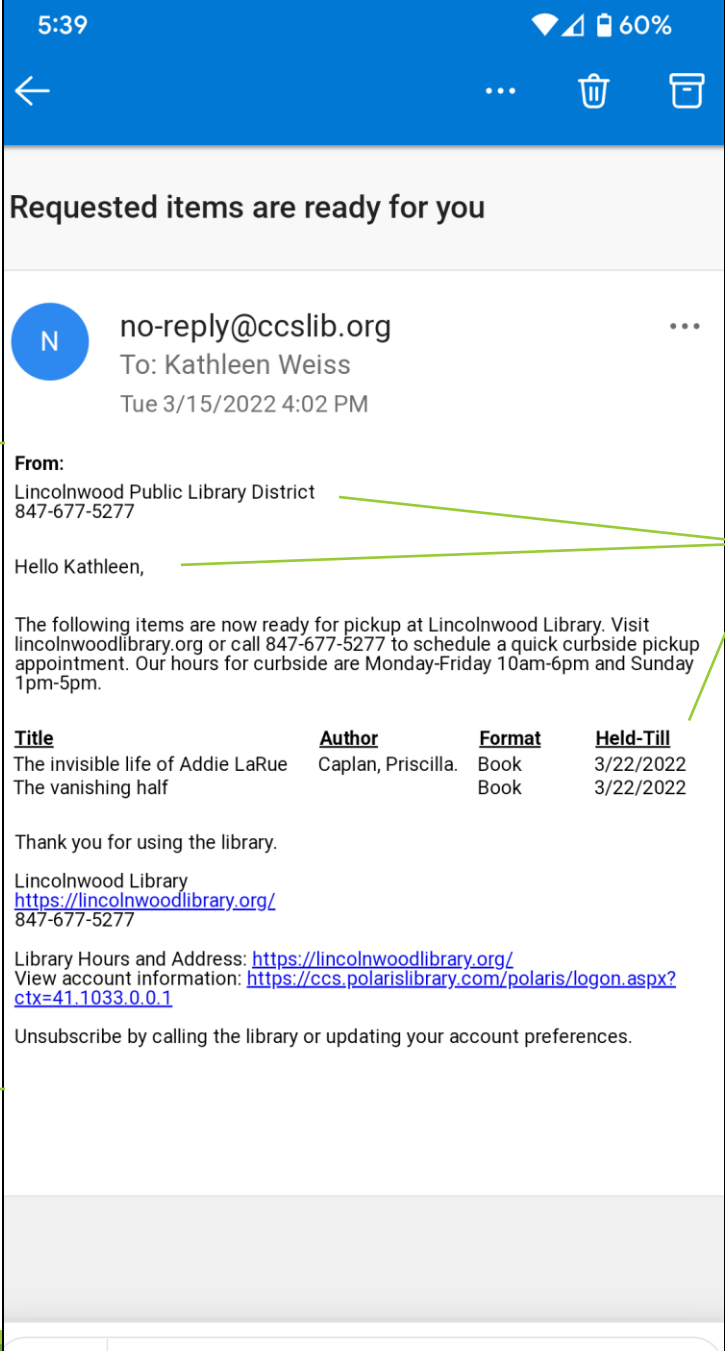
How library card use is captured – several resources and databases that do not capture library card use, want to capture all usage and that users are not purged prematurely

# CCS Staff Report

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Enhancements to Email Notices

Premiered on Tuesday



Plain language and a consistent, web safe typeset for increased accessibility

A welcoming greeting using the patron's first name, improved formatting, and jargon-free copy

Removal of redundant information and elements

A footer for all email notices including links to the

- library address
- library hours
- catalog sign-in page for easier account management

Bite-Size Training:  
Simply Reports  
Delivered to Your Inbox

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# Case Study: Lincolnwood Hotspots & Niles-Maine Digital Services Collection

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Both libraries have a digital services department. Hot spots are one of the hottest items in their collections.

Each libraries gets a weekly report sent to the department inbox of overdue hotspots with the patron's contact information.

Staff can contact these patrons to return hotspots. This helps to shorten holds queue. Staff can use the report to quickly contact patrons instead of having to look up each hotspot.

# Other usage cases

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Email marketing to your patrons

Weeding reports for designated call number ranges

Collection and holds management (as seen in our case study)



# How can I set this up?

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Full instructions are linked here: <https://www.ccslib.org/training/introduction-to-simply-reports/#/lessons/ovNqCxKMPH8ODEd7f6noFJYLpWJn9wuV>

See handouts on:

- Saving and Scheduling Reports
- Publishing Reports to the Client

# Live Example

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[https://ccsliborg.sharepoint.com/:v:/s/CCSTraining/EZZuNZNI-vJNqIUr3QTLj-8BdryGWrit8Ik\\_VpDJSa27zA?e=T0sGJL](https://ccsliborg.sharepoint.com/:v:/s/CCSTraining/EZZuNZNI-vJNqIUr3QTLj-8BdryGWrit8Ik_VpDJSa27zA?e=T0sGJL)

## 7 days overdue example for PAS 2022 was executed at 3/16/2022 11:00:01 AM

📎 1 ▾



**no-reply@ccslib.org**

Wed 3/16/2022 11:00 AM

To: Kathleen Weiss



7 days overdue example for ... ▾

✓ Saved to OneDrive

Here's your report!

The report is accessible at the following address:

<http://ccs-pro-rpt/ReportServer?%2FPolaris%2FCustom%2FNiles-Maine%20District%20Library%2F7%20days%20overdue%20example%20for%20PAS%202022&rs%3AParameterLanguage=en-US>

[Reply](#)

[Forward](#)



File Home Insert Draw Page Layout Formulas Data Review View Automate Help Editing Share Comments Catch up

Clipboard Font Alignment Number Styles Cells Editing Analyze Data Analysis

A6 fx 31491013411586

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	7 days overdue example for PAS 2022													
2														
3														
4														
5	ItemBarcode	CallNumber	DueDate	BrowseTitle	PatronBarcode	PatronFullName	PhoneVoice1							
6	31491013411586	NILES HOTSPOT #16	2/16/2022 11:59:59 PM	Niles-Maine mobile hotspot										
7	31491012981167	NILES GOPRO HERO 6 BLACK #2	3/5/2022 11:59:59 PM	GoPro Hero 6 Black										
8	31491011856311	NILES NIKON D5500 DIGITAL CAMERA	2/26/2022 11:59:59 PM	Nikon D5500 18-140 VR digital camera kit										
9	31491012641738	NILES JANOME SEWING MACHINE	2/26/2022 11:59:59 PM	Janome sewing machine.										
10														
11														

# Diversity Audit Dashboard

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Member Services Librarian, Rachel Fischer will present on the Diversity Audit Dashboard

Note your questions and thoughts as she presents

- We will be using these in a design thinking activity by working in small groups following her presentation

# Initial Impressions

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Take five minutes, collect your thoughts, and write down your initial impressions to the Diversity Audit Dashboard.

Be back at 10:42 AM

# I Like, I Wish, What If?

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## Design Thinking Activity

Using a digital post-it note tool, staff can share their thoughts on the Diversity Dashboard Audit Dashboard

Place one thought on each post-it note

Sort the thought into

- I Like: includes positive feedback
- I Wish: include things you wish were different
- What If: includes ideas about how the tool could be improved or are tangentially related

# I Like, I Wish, What If?

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Staff work in groups of five(ish).

Elect a spokesperson to tell us about your post-it notes.

Try to submit about five thoughts, ideas, or comments as post-it notes (more or less is fine!).

Zoom will automatically split you into small groups.

Rachel or I will pop into your group to deliver a link for your digital “board”.



# Let's try it out

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<http://linoit.com/users/KathleenWeiss/canvases/PAS%20-%20Diversity%20Audit%20Dashboard>

# Now it's your turn

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You will be sorted into groups of five.

Use the link in the chat to access your pin board. (Rachel or I will drop into your group to deliver the link).

Group 1: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%201>

Group 2: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%202>

Group 3: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%203>

Group 4: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%204>

Group 5: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%205>

Group 6: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%206>

You will have seven to ten minutes to complete your activity.

I will issue a one-minute warning. This appears as a banner at top of screen.

# Let's discuss

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Your group spokesperson should summarize the feedback from your group

Group 1: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%201>

Group 2: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%202>

Group 3: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%203>

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Group 5: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%205>

Group 6: <http://linoit.com/users/KathleenWeiss/canvases/PAS%20Group%206>

# Join our Diversity Audit Dashboard Team

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Before going live with the Diversity Audit dashboard, CCS needs a better idea about how the tool works for library staff like you.

You can sign up to join our diversity audit dashboard team to test out this exciting new tool.

<https://www.ccslib.org/training/diversity-audit-research-team>

# Additional Agenda Items

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First Amendment Audits