

# Knot Notes...



QUIPU GROUP LLC  
services, products and consulting

## KNOT NOTES MAY 2015

Spring has sprung and it's been raining so much in Denver that Melissa thinks she's back in her hometown of Seattle. Happily, summer is right around the corner, guaranteeing more sunshine as well as a trip to San Francisco for ALA Annual for Melissa and Robert ([contact us](#) if you'd like to make an appointment). Find below updates on Quipu Group's ongoing consulting projects and software development, as well as a report from Scott on the semi-annual [Innovative Users Group](#) meeting, held this year in Minneapolis. If there's something you like to share in a future Knot Notes, just drop us a line—we love to celebrate client success stories!—*The Partners of Quipu Group*

## CONSULTANT'S CORNER

*Boulder Public Library, Carnegie Branch Library for Local History Digital Project*

The Carnegie Branch Library for Local History, a branch of the Boulder Public Library, is dedicated to the acquisition, arrangement, description, preservation and dissemination of local history materials pertaining to Boulder County (CO). Melissa will be co-consulting with [Carson Block](#) to assist in selecting and implementing a Digital Asset Management System for Archived Resources and to develop policies and procedures for the digitization, preservation and presentation of current and future materials.

*Oxnard Public Library Now Live on Polaris*

Oxnard Public Library went live on their new [Polaris system](#) from Innovative Interfaces on May 7, 2015. Oxnard is a three-branch system on the coast between Los Angeles and Santa Barbara, including the South Oxnard branch which solely utilizes RFID and self-check functionality.

*Pasadena Public Library & Glendale Library, Arts and Culture ILS Conversion Completed*

Congratulations! In a longstanding partnership, these two libraries went live on their new Sierra system from Innovative Interfaces on May 20, 2015, replacing a system that had been in place since 2003. As imagined, many procedures and workflows required review both before and after the RFP stage, and Quipu Group is proud to have been part of this process.

**Innovative Users Group 2015 Report, from Scott Stockton**

## Dates to Remember

[SLA](#), Boston, June 14-16, 2015

[ALA Annual](#), San Francisco, June 25-30, 2015

[ISTE](#), Philadelphia, June 28-July 1

[IFLA](#), Cape Town, South Africa, August 15-21, 2015

[Western Museums](#), San Jose, October 24-27, 2015

## THINGS WE LIKE

[Want to Make the World a Better Place? Start Trusting Your Clients](#)

[IMLS Museum Assessment Program Grant](#), Deadline: July 1, 2015

[Managing Multiplicity in Library Systems Landscape 2015](#)

This was a banner year for the IUG Conference. For the first time, users of three different integrated library systems—Innovative Interfaces, Polaris, and VTLS—were represented at one conference. There were many great programs and poster sessions, with something for everyone. Quipu Group is very pleased to have been a part of it all. It was great to see our Polaris customers as well as our ILL customers, and meet lots of new people from all over the country.



Quipu Group was represented by Robert Anderson and Scott Stockton, who covertly used some of the downtime at our booth to finish up some programming on a couple of projects. During the busy times, it was our eCARD and PITS (Patron Incident Tracking System) products that were generating interest, and we really appreciated the many attendees whom stopped by our booth to find out more about what we do, and what we can do for you.

It was also wonderful to see Carol Gyger from Poudre River River (CO) Public Library District receive the Beacon Award, which was created “to honor exceptional service to the Innovative Users Community through presentations, collaboration, selfless dedication to libraries as a whole, and sage advice to others via the IUG List. While a great implementation is the product of a



great employee, the IUG Beacon Award will acknowledge great community members—people who help others attain greatness and share the knowledge that she/he gained in the process.” Carol is one of the people who brought IUG and Quipu Group together, and she has continued to be a champion of both organizations in the years we have worked together.

I had the opportunity to attend a presentation by Jill Henrikson, the library systems administrator of Pierce County (WA) Library (PCL) about the [Book Club Kit](#) reservation system we created for that institution last year. The program began with a description of PCL's journey through the software development process in the midst of changing staff and priorities at the library. It really showed the difficulties libraries face when undertaking a development project in a constantly changing environment.

Henrikson also shared the PCL experience in migrating from their previous reservation system for book club kits to the new, Quipu-created system. Part of the migration path included an inventory of Book Club Kits and minor changes in cataloging practice. Ultimately, the end result has been increased usage of PCL Book Club Kits and simplified management of those kits for PCL staff.

We're looking forward to IUG 2016, March 16-18, in San Francisco, and hope it will be as fun and exciting as this year's conference.

**Partner Corner: Robert Anderson**

I handle finance, sales and business development for the Quipu Group, but my primary responsibility is new software development.

Before joining the library world, I was a software developer for the banking industry. In the banking industry,  $1 + 1 = 2$ ; not so much in the library world. To develop new software for libraries, it takes knowing enough to ask the right questions and knowing enough to provide advice when appropriate. It also requires the understanding that no two libraries handle similar services the same way or have the same policies. What appears simple and standard on the surface quickly becomes complicated and unique.

In developing eCARD, Quipu's patron online registration and verification service, the goal for all libraries is the same— get qualified users registered online to use library services and block unqualified users.

Sounds simple enough. Display a form, perform some verification, register the new patron.

But what factors need to be considered for a registrant to become a qualified patron?

- Lives in the library's service area by some geographical determination.
- Age appropriate. If under a certain age, ask for guardian information?
- Did the address provided pay library district taxes?
- Is the address within the actual library district when an area has overlapping library districts?
- Does the user live outside of the library's service area, but has a reciprocal card?
- Is the user currently stationed at a military base?
- What are the library's policies concerning information gathered from the patron and how does that impact qualification?
- What if a rural address is not served by the United States Postal Service? How do you determine if the address is in the library service area?

Does your head hurt yet? Here are a few more important considerations:

- Does the library take the patron's full birth date, only birth year, or none at all, and what implications does this cause for the particular ILS system in use?
- How does the patron data become part of the library's online database? What ILS system does the library use? Does the ILS have an API that

can create a patron record? What information can the API handle?

- Do you allow patrons with an existing library card to re-register, and what affect could existing fines and transactions have for the patron?
- What are the library's unique policies and how do they affect access to an online registration?
- What statistics does the library gather during registration and can that information be stored in the ILS?

And I thought libraries just loaned books to people, right?

As I have learned since my first days at The UnCover Corporation (now guess my age!), libraries offer a wide array of services to their populations and have to deal with all the logistics and policies that go with each service. In order for new software to actually help support and provide those services, the developer not only needs to know how to "code," but also needs to be able to learn how the libraries perform each function in order to provide the service.

We have worked with multiple libraries and consortia to develop a courier management system, museum pass programs, patron incident tracking, ebook delivery, statewide database purchasing, conference management, patron registration, electronic resource management, etc... Each project always goes through: "What do you want?," "How do you do it now?" and "How do you want to do it?" Very often, the "How do you want to do it?" takes many sessions to really determine the best work flow.

Upon forming the Quipu Group, one of our stated primary missions was to develop software for the library industry where no other software existed and to provide consulting before, during and after development, based on the needs of the client. We work with each library to understand what is needed and how it needs to be done, and have learned to not assume, ever, that one size fits all. All the partners of The Quipu Group worked for The Colorado Alliance of Research Libraries. In that environment, we were taught a valuable lesson that while all libraries may be looking to solve the same problem, they need the solution to be unique to their institution.

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