

Knot Notes...



QUIPU GROUP LLC
services, products and consulting

KNOT NOTES May 2016 -- Apologies for the blank edition sent last night!

We're pretty sure the last snow has fallen in Denver. Summer is right around the corner and we're feeling social. Did you know that Quipu Group has a [Facebook page](#)? Check it out for news about our customers, product upgrades, and more. For this issue, partner Robert Anderson has put together a terrific thought piece on the value of reliable and trustworthy online registration that is definitely worth a read. If you are going to be at ALA and would like to schedule an appointment, please give us a shout.—The Partners of Quipu Group

Consultants Give Back at ALA!

Consultants Giving Back provides a chance for library leaders to meet with the consultant of their choice for 30 minutes with no-strings-attached advice for their library. Top consultants volunteer their time to meet one-on-one and provide library leaders with valuable insight and problem-solving. This event features consultants with expertise in a wide variety of topics like facilitation, leadership development, facility planning, marketing, program evaluation, services to multicultural communities, youth services, and other relevant topics.

Participants will gain a new perspective, new tools to address projects and will return to their library with an action plan for their project or problem-solving. Different from a sales-pitch, this is a comfortable, non-intrusive way to becoming better-informed on the subject matter discussed.

For participants, it's a chance to be heard by and learn from a caring expert in the field. For consultants, including Quipu Group, it's an opportunity to "pay it forward." Melissa Stockton will be representing for QG, so please check in and take advantage of this terrific service!

Sunday, June 26, 1 - 2:30 p.m. Location: OCCC, W102A

To schedule your free consulting session, please click on this link.

PITS Version 1.5.2 Update 2

We are pleased to announce that PITS Version 1.5.2 Update 2 has been rolled out to all PITS customers. The update includes several bug fixes, enhanced search and filtering capabilities, and provides more control over a library's list of infractions and locations.

Obtaining New Patrons in The New Millennium, and Why eCARD Could Be the Solution

So, it is 2016. How do you get new patrons/customers for your library? Do they still have to come into the library? What about the younger generation that has grown up with online registration?

DATES TO REMEMBER

June 23-28 - [ALA Annual](#), Orlando, FL



August 13-19 - [IFLA](#), Columbus, OH



August 17-18, [Digitization 2016](#), Panama City, FL



THINGS WE LIKE

[First Lady Will Recognize Libraries](#), Museums for Top Honor in White House Ceremony, June 1, 2016

[How Public Libraries Play a Role in Patron Privacy](#)

[Copyright Report](#) from the Copyright Librarian

When they want to use your library's online resources, do they still have to show up to a branch before gaining any access? Do they skip the library because of this and just use a web search? Do they then miss out on the more authoritative resources your library has procured? How about those who went to all those library activities as a child and now are old enough to have their own library card? How difficult (in their opinion) is it to gain access?

Okay, so you do offer **online registration**, which allows for certain access to resources. Great! Wait a minute, that new library patron using your online resources (pricey!) is from Bora Bora. Is that whom you intended to use your resources? What do your database vendors think about granting access to the world at large?

Maybe you use your ILS's online registration form and only allow certain **zip codes**. As long as the patron enters one of your area's zip codes, even though the address is false, do they still get access? What about areas with your zip code that chose not to pay library use taxes?

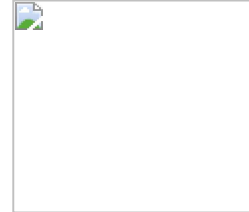
How important to your library is granting online registration to only qualified people? How far down the rabbit hole do you go in restricting registration for essentially a free library card? Or is that library card really "free"? Libraries have plenty of expenses; buildings, staff, online resources, books, periodicals, security, on and on. These are **not free**, and are supported by taxes, donations, Friends of the Library groups, and more.

So how do you allow online registration to only qualified users? Quipu Group has been dealing with [online registration](#) since 2006, creating one of the first online registration systems with Contra Costa County Library (CCCL). Quipu Group developed the software to run on the library's website and ILS system to handle registration. CCCL was also concerned about **staying in compliance** with their online database vendor contracts, so Quipu Group introduced address verification by comparing the entered address on the registration form to United States Postal Service data. Now we could tell that the entered address was a valid USPS address and within the library's service area, residences within Contra Costa County, CA.

Granted, an address can be verified as valid and standardized before being created in the patron files, but what about addresses that may be in the general service area though within that area, certain addresses should be excluded? What about **overlapping zip codes**? Overlapping library districts provide a further challenge. Where available, eCARD can incorporate external data to determine if the property address is with-in a particular library district of the county.

What about addresses in which the USPS doesn't deliver? If the USPS doesn't deliver to an address, it will show the address as not existing. Not great for **rural patrons** who have an even greater need for online library access. eCARD can determine if the address is still valid through other delivery sources.

So far, checking has been at the address level. What about **online identity**? Most libraries want to know if the person registering is actually that person and that the person actually lives at the residence. The first line of identity matching is name association. Is the person's name entered on the registration form actually associated with the residence address entered? This is based on



credit reports, magazine subscriptions, utility bills, etc. For juvenile patrons who probably don't have a credit history or have not subscribed to magazines in their name, the eCARD registration form can further ask for guardian information to find a match.

Still want to know if the person filling out the registration form is registering for themselves? Enter **identity matching**. Identity matching takes particular information from the registration form and determines if the information given is close enough to indicate it is the same person. If not, then "out of wallet" questions can be posed before proceeding with the registration. Questions such as "Do you know this person?", "What color is your current car?", or "Have you ever lived at...?" If the user gets the questions correct, then there is a higher probability it is actually the same person.

Now that the address and patron has been "qualified," how to get the new account set up? Quipu currently works with TLC/CARL (CARLX) and Innovative Interfaces (Millennium, Sierra and Polaris) by way of the **ILS API** (CARLX and Polaris) or registration form (Millennium & Sierra) to create the patron record and give immediate access. Quipu Group will be adding more vendors as other library systems demand this service as well.

How about a **non-API** solution? If you have an existing online registration page, Quipu can do the validation service before the online form is submitted.

The benefits of using an online registration form are clear for the virtual user. For patrons who come into the library, they can simply fill out the registration form online at a computer in the library, walk up to the staff desk, show identity and be granted a full-access card on the spot. This saves staff time from doing data entry on addresses and allows for all the validation and standardization of the patron record.

How Does This All Add Up?

Determining how far to go in validating a patron registration is different for each library. There is always a cost/benefit and policy analysis that the library, with Quipu's assistance, must determine.

Postal Code Matching

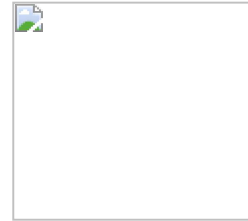
- Cost: Least expensive
- Benefit: May block a few registrations, but only checking on postal code does not identify incorrect addresses. Address entered will not be standardized in your ILS.

Address Validation & Standardization

- Cost: A little more cost and involves setup work.
- Benefit: Address validated before allowing registration and service area determination. Address standardized for your ILS

Non-USPS data

- Cost: Optional cost above Address Validation & Standardization
- Benefit: Further checks to make sure address within service area (overlapping postal codes), paid library taxes, within the correct library district, etc.



Name Association:

- Cost: Additional cost to Address Validation & Standardization.
- Benefit: Adds a basic layer of identity matching to name and address entered on the registration form.

Identity Matching:

- Cost: Most expensive
- Benefit: The best way to match the name on the registration form to the person filling out the form.

Quipu Group continues to explore different address verification and online identity matching services to further enhance the registration process.

Quipu Group has explored and implemented all these levels and believes it is each library's decision to make about the cost/benefits. Please contact us with any questions or for a formal quote.

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