



G E O R G I A L I B R A R Y

**PINES**

Public Information Network for Electronic Services

**PINES LIBRARY SITE VISIT LOG**

**DATE:** 11.11.2008

**LIBRARY:** Athens Regional Library System/Athens Clarke County Library

**MET WITH:** Kathie Ames, Judy Atwood, and MaryAnne Driver (ARL); Elaine Hardy, and Katherine Gregory (PINES)

**VERSION OF SOFTWARE:** 1.2.2.2

**ISSUES LOG**

<p><b>BUG / HELP DESK</b></p>	<p><b>Batch loading Overdrive records:</b> need to look into whether PINES staff can do this for those 20 or so library systems.</p> <p><b>Searching:</b> often times a search that a patron conducts on the OPACS will not yield the title when searching in the EG SC; ISSN and ISBN searches and author/title searches unreliable in SC</p> <p><b>Reports:</b> more templates needed. Especially one for item call number range and item call number range use count</p> <p><b>Documentation:</b> too many different sites to go to. Gets confusing to know where to go for what; all documentation needs date last edited or date released</p> <p><b>Cataloging:</b> Only  a of 110 field displays in OPAC. All fields should display</p> <p><b>OPAC display:</b> When a search results in a result set with multiple pages , numbering and navigation from the second page of results in MARC view becomes compromised. For example, rather than 11 of 40 records, the count becomes 1 of 30. Cannot navigate back to first page of results without returning to OPAC view.</p> <p><b>Advanced Search:</b> Can only use enter key to submit form if just the first box is used. Entering data into more than the first well prevents the enter key from functioning unless user tabs over to button (can use mouse to click on it)</p>
<p><b>SOFTWARE DEVELOPMENT</b></p>	<p><b>Reports:</b> #1 priority; there needs to be an easier interface, template building is too difficult and not easy to understand. Can't trust the numbers out of circ reports, IntraPINES loans numbers seem wrong; need reports are easy to access, easy to pull, and that don't require a lot of specialized knowledge as well as reports that are easy to read and understand and that are in a better format.</p> <p><b>Billing:</b> Billing is slow to pull up and when printing a receipt.</p> <p><b>Spell Check:</b> Often when misspelling something there are no "Did you mean?" examples.</p>

	<p><b>Patron Deletion:</b> there needs to be a way for staff to delete patrons and for the history to remain for stat reporting.</p> <p><b>Strict Barcodes:</b> make them less strict to include those items that are 13 digit and not just 14. Athens uses 14 digits but is often working with neighboring libraries that have 13 digit and they have to uncheck the strict barcode whenever they come across those.</p> <p><b>Inventory Module:</b> we have no way of knowing if we are getting robbed without being able to do inventory</p> <p><b>Cataloging:</b> Index tag 246 and all subject fields and subdivisions; need ability to create copy notes in batch and to have templates; need indication system is working (such as an hourglass) to prevent user re-initiating action; automatically delete unwanted fields on import (029, 938, 948) of MARC record from OCLC; request function key for print current screen; request separate editor to create and edit item attribute templates; need line wrap in MARC editor; ability to change default search type in advanced search rather than always defaulting to keyword search</p> <p><b>Searching:</b> Related author search should always return author searches via authority headings.</p> <p><b>Holds:</b> holds should go from local/home library to system to geographic area and only out to the state if it can't be handled on a more local basis. I think transit time would improve significantly.</p>
<p><b>TRAINING</b></p>	<p><b>Online Training:</b> live, recorded, and self paced training. Need to be able to channel a question when attending a recorded or self paced training session.</p> <p><b>Holds:</b> need a better understanding of what title level, volume level, and copy level holds are. Need to remind staff to mark items missing after several attempts to find the item.</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Subcommittees:</b> Staffs from small libraries are thinking too locally and not always of what is best for all of PINES libraries when making their decisions on proposals.</p> <p><b>Subcommittees:</b> send out a reminder to subcommittees that they should be working with and questioning their coworkers and directors before sending out a vote</p> <p><b>Subcommittees:</b> open up Subcommittee discussion to allow all libraries to weigh in on their opinions and experienced. Maybe do this through the forum. Perhaps broaden it to a vote per system.</p> <p><b>Subcommittees:</b> They need to be used more for testing</p> <p><b>Feeling of Mistrust:</b> feeling that PINES staff is secretive. Providing only 2 week notice for an EC meeting makes one wonder if that was deliberate so folks would not come.</p> <p><b>Communication Breakdown:</b> who should we be talking to, GPLS PINES staff or ESI? Need chart of responsibility to determine whom to contact about specific issues/problems; need one location for information critical to PINES (updates, known issues, etc); need to better define business relationship with ESI in terms of priorities ; recognize that library staff are a client base and that concerns are valid and their need to know is important</p> <p><b>Circulation:</b> libraries should be able to include in their circulation counts item loans to other PINES libraries via PINES holds. Can get stats via two separate reports but both should be considered</p>

	<p><b>Email Reminder to all PINES:</b> remind them and new staff of what PINES founding principles are and that all new staff must be signing the confidentiality agreement and that it is inappropriate to be naming patrons and items on listservs.</p>
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RESOLUTION TRACKER		
	ISSUE	ASSIGNED TO
BUG / HELP DESK	<b>Batch loading Overdrive records:</b> need to look into whether PINES staff can do this for those 20 or so library systems	Elaine – part of software development infrastructure plan (Vandelay) – scheduled for 12/08
BUG / HELP DESK	<b>Searching:</b> often times a search that a patron conducts on the OPACS will not yield the title when searching in the EG SC	Dawn – will follow up with ARL for more information to attempt to replicate
BUG / HELP DESK	<b>Searching:</b> ISSN and ISBN searches and author/title searches unreliable in SC	Elaine/Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox
BUG / HELP DESK	<b>Reports:</b> more templates needed. Especially one for item call number range and item call number range use count	Katherine – will develop templates to assist libraries as requested
BUG / HELP DESK	<b>Documentation:</b> too many different sites to go to. Gets confusing to know where to go for what; all documentation needs date last edited or date released	PINES team – part of communications plans, in process.

<p><b>BUG / HELP DESK</b></p>	<p><b>Cataloging:</b> Only  a of 110 field displays in OPAC. All fields should display</p>	<p>Elaine/Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox</p>
<p><b>BUG / HELP DESK</b></p>	<p><b>OPAC display:</b> When a search results in a result set with multiple pages , numbering and navigation from the second page of results in MARC view becomes compromised. For example, rather than 11 of 40 records, the count becomes 1 of 30. Cannot navigate back to first page of results without returning to OPAC view</p>	<p>Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox</p>
<p><b>SOFTWARE DEVELOPMENT</b></p>	<p><b>UI: Advanced Search:</b> Can only use enter key to submit form if just the first box is used. Entering data into more than the first well prevents the enter key from functioning unless user tabs over to button (can use mouse to click on it</p>	<p>Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox</p>
<p><b>SOFTWARE DEVELOPMENT</b></p>	<p><b>Reports:</b> #1 priority; there needs to be an easier interface, template building is too difficult and not easy to understand. Can't trust the numbers out of circ reports, IntraPINES loans numbers seem wrong; need reports are easy to access, easy to pull, and that don't require a lot of specialized knowledge as well as reports that are easy to read and understand and that are in a better format.</p>	<p>Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox</p>

SOFTWARE DEVELOPMENT	<b>Billing:</b> Billing is slow to pull up and when printing a receipt.	Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox <b>NOTE:</b> Billing is high priority for most sites. This will be reflected on the priorities timesheet.
SOFTWARE DEVELOPMENT	<b>UI: Spell Check:</b> Often when misspelling something there are no “Did you mean?” examples.	Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox
SOFTWARE DEVELOPMENT	<b>Patron Deletion:</b> there needs to be a way for staff to delete patrons and for the history to remain for stat reporting.	Katherine – will submit request to the PINES Subcommittee for discussion. If approved by the Executive Committee then Emily will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox
SOFTWARE DEVELOPMENT	<b>Strict Barcodes:</b> make them less strict to include those items that are 13 digit and not just 14. Athens uses 14 digits but is often working with neighboring libraries that have 13 digit and they have to uncheck the strict barcode whenever they come across those.	Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox
SOFTWARE DEVELOPMENT	<b>Inventory Module:</b> we have no way of knowing if we are getting robbed without being able to do inventory	Katherine –will work with ARLS to develop templates in order to get the results they need for inventory purposes Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox
SOFTWARE DEVELOPMENT	<b>Cataloging:</b> Index tag 246 and all subject fields and subdivisions; need ability to create copy notes in batch and to have templates; need indication system is working (such as an hourglass) to prevent user re-initiating action; automatically delete	Elaine/Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox

	<p>unwanted fields on import (029, 938, 948) of MARC record from OCLC; request function key for print current screen; request separate editor to create and edit item attribute templates; need line wrap in MARC editor; ability to change default search type in advanced search rather than always defaulting to keyword search</p>	
<b>SOFTWARE DEVELOPMENT</b>	<p><b>Searching:</b> Related author search should always return author searches via authority headings.</p>	<p>Elaine/Emily – will integrate into development spreadsheet and assign timeline to feature post meeting with Equinox</p>
<b>SOFTWARE DEVELOPMENT</b>	<p><b>Holds:</b> holds should go from local/home library to system to geographic area and only out to the state if it can't be handled on a more local basis. I think transit time would improve significantly.</p>	<p>Emily – will put on testing checklist for Holds Working Group; Will report results to all Directors</p>
<b>TRAINING</b>	<p><b>Online Training:</b> live, recorded, and self paced training. Need to be able to channel a question when attending a recorded or self paced training session.</p>	<p>PINES team – part of developing communications plans; integrating into Wimba/Webjunction</p>
<b>TRAINING</b>	<p><b>Holds:</b> need a better understanding of what title level, volume level, and copy level holds are. Need to remind staff to mark items missing after several attempts to find the item.</p>	<p>Emily – will put on testing checklist for Holds Working Group; Will report results to all Directors</p>

<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Subcommittees:</b> Staffs from small libraries are thinking too locally and not always of what is best for all of PINES libraries when making their decisions on proposals.</p>	<p>Elizabeth – forwarding concerns for resolution</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Subcommittees:</b> send out a reminder to subcommittees that they should be working with and questioning their coworkers and directors before sending out a vote</p>	<p>Elizabeth – forwarding concerns for resolution</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Subcommittees:</b> open up Subcommittee discussion to allow all libraries to weigh in on their opinions and experienced. Maybe do this through the forum. Perhaps broaden it to a vote per system.</p>	<p>Elizabeth – forwarding concerns for resolution</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Subcommittees:</b> They need to be used more for testing</p>	<p>Emily – part of communications plans, in process</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Feeling of Mistrust:</b> feeling that PINES staff is secretive. Providing only 2 week notice for an EC meeting makes one wonder if that was deliberate so folks would not come.</p>	<p>Elizabeth – forwarding concerns for resolution</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Communication Breakdown:</b> who should we be talking to, GPLS PINES staff or ESI? Need chart of responsibility to determine whom to contact about specific</p>	<p>Emily – part of communications plans, in process</p>

	<p>issues/problems; need one location for information critical to PINES (updates, known issues, etc); need to better define business relationship with ESI in terms of priorities ; recognize that library staff are a client base and that concerns are valid and their need to know is important</p>	
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Circulation:</b> libraries should be able to include in their circulation counts item loans to other PINES libraries via PINES holds. Can get stats via two separate reports but both should be considered</p>	<p>Elizabeth – forwarding concerns for resolution; may need EC decision</p>
<p><b>POLICY AND/OR PROCEDURAL</b></p>	<p><b>Email Reminder to all PINES:</b> remind them and new staff of what PINES founding principles are and that all new staff must be signing the confidentiality agreement and that it is inappropriate to be naming patrons and items on listservs</p>	<p>Elizabeth – forwarding concerns for resolution</p>