



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: 11/13/2008

LIBRARY: Dougherty County Public Library

MET WITH: Teresa Cole (Director), Ashley Moore, Pauline Abidde

VERSION OF SOFTWARE: Evergreen 1.2.3.1

ISSUES LOG	
BUG / HELP DESK	<ul style="list-style-type: none"> - Helpdesk responsiveness has been very slow - active Helpdesk ticket resolving sharing issues between Lee County and Dougherty County systems – want to share A/V materials but not new items - transit message coming up on certain items without hold information attached – finding hold information requires more information – found while cataloging new items - concerns about reliability of report output – two different reports on what should be the same data produce different results (confirms concerns reported by SWGRL on 11/12) - need for reliable way of creating weeding reports - would like to edit holds slip layout – where is this template located? - nearly impossible to get a count of users with activity in a given time period—not just cards that are not expired—see helpdesk ticket 7372 - question: When will be begin receiving again the change of address updates?
SOFTWARE DEVELOPMENT	<ul style="list-style-type: none"> - ability to do an inventory is a top development priority of Library Director Teresa Cole - need for automatic setting to “long overdue” status after a set time – this issue results in complicated discrepancies with Unique Management Services, who handles collections, and affects customer service adversely - need for more printer profile options for both circ receipt printers and for cataloging spine label printers (temporary solution: collect custom templates and make them available for download from PINES page) - problem with opportunistic holds capture - items not capturing unless copy-level holds are used (confirms holds issue reported by WGRL 10/29) - need for a way to place holds for patrons without needing the patron card each time

- need for ability to limit by audience – juvenile/adult in OPAC

CIRCULATION ISSUES (provided by library staff):

- length of time for billing transactions, including receipt printing, has been confirmed on this visit
- steps necessary to check out materials when a patron has an "Expired" card. After changing the card's expiration date, the checkout time then shows "Normal." One must change the checkout time to "Normal + 14 Days" and "Refresh."
- when checking in materials, if an item comes up with a HOLD and a receipt is printed, the cursor doesn't automatically go back to the "Enter Barcode" box.
- the cursor does not return to the Checkout box after a HOLDS slip is printed
- request for damaged item check-in option—so that items will not be captured for hold, etc.
- request for missing items/pieces check-in with notification to patron of missing pieces
- request for notification history for holds and notices– date e-mails or letters sent / eventually when automated calls were made
- why must all 3 search fields default to keyword? More helpful if one were keyword, one title and one author.
- punctuation in names. If the name is not searched exactly as it is put in, it won't bring up the record. i.e. if someone omits an apostrophe when registering a patron but then includes the apostrophe when pulling up the record, record is not retrieved.
- patron notification when a hold cannot be filled, after initial indication was that it could be - e-mail and phone capability

CATALOGING ISSUES (provided by Pauline Abidde):

- When adding volumes, I would like to see the call numbers of any of my library's existing volumes in the drop down list. I would like to select and apply it to the new volume. Eliminate the need to rebuild a call number that has already been built.
- Apply a new template to an item without building on the old one. (In other words completely overwrite the old template with new or default attributes; not "set" attributes from the old template.)
- fix the stall on retrieving the importing bibliographic record (Currently about every 5th import stalls on retrieval). When this happens record can only be retrieved with the control number.
- request for automatic deletion of volume when all item are deleted. (Not necessarily vice versa because this leaves too much room for error; unless a warning is added.)
- request for warning popup when deleting last item in a particular system. (This will save staff a lot of time in identifying last copies that must be sent to cataloging for holdings deletion in OCLC.
- display sets in numerical or alphabetical order in "holding maintenance" listing.
- request for ability to create item attribute template without having to create or edit an existing copy.

	<ul style="list-style-type: none"> - word wrap in Marc Editor. - addition of Marc records for NetLibrary (GALILEO) and Overdrive holdings (GADD) <p>REPORTS ISSUES (submitted by library staff):</p> <ul style="list-style-type: none"> - automatic expired/canceled holds list - additional sort options for holds pull list – sort first by one criterion, then by another, etc. - need an “and/or option” on reports – want an item to display if it meets x criteria and/or y criteria - sharing outside of the library system - updating a template without having to clone the template
TRAINING/ DOCUMENTATION	<ul style="list-style-type: none"> - Ashley Moore expressed her hope that Albany could become a PINES training location for Southwest Georgia - need for clarification of reports terminology - need for settings for new thermal printers to be posted on PINES web site – Dawn suggested getting this information from Jarvis at Hall County
POLICY AND/OR PROCEDURAL	<ul style="list-style-type: none"> - Teresa expressed her need to see progress in PINES/Evergreen within the next 1½ years - courier issues should be fixed without devising software workarounds - there is a need to revisit and clarify the policy on “long-overdue” items - question about function of PINES Subcommittees – why is it that all subcommittee members vote on all issues, even if they are from outside a member’s area of expertise? - minors have no official form of identification and the ID field is generally used for parent’s ID – this causes problems when registering parents for a card. The field for parent’s name opens up once a minor’s DOB is put in, why not some way of indicating that the id # entered is for the parent not the child. Especially important when a card holder turns 18.

RESOLUTION TRACKER		
	ISSUE	ASSIGNED TO
BUG / HELP DESK	Helpdesk responsiveness	Dawn Dale – has already implemented improvements – PINES Team working to streamline requests for faster resolution and easier progress tracking
BUG / HELP DESK	Lee Co./Dougherty Co. A/V sharing	Dawn Dale – active Helpdesk ticket #7425 placed by Leslie Partridge of Lee County – currently in care of Bill Erickson (this needs verification) – add Ashley to ticket cc list
BUG / HELP DESK	Transit Messages lacking hold information	Dawn Dale – we need a Helpdesk ticket (for tracking) with specific examples
BUG / HELP DESK	Questions about reliability of reports	Dawn Dale (initially) – we’ll need a Helpdesk ticket created for each report in question and PINES team will troubleshoot
BUG / HELP DESK	Weeding candidate reports	Chris Sharp – working from re-opened Helpdesk ticket #7218 – will need further explanation of parameters from Ashley to create report templates
BUG / HELP DESK	Holds receipt template change	Chris Sharp – need to discover how this is formatted in the staff client configuration – need Helpdesk ticket for tracking purposes
BUG / HELP DESK	Change of Address updates	Dawn Dale - Question about when library will begin receiving change of address updates - Dawn is working out new, more efficient way to handle this
BUG / HELP DESK	Active Patrons report	Chris Sharp – reopened Helpdesk ticket #7372 – will need specific parameters from Ashley to create report templates
SOFTWARE DEVELOPMENT	Inventory Module	Emily Almond – development spreadsheet entry Chris Sharp – will work with library to create ways to improve this situation while solution is being developed
SOFTWARE DEVELOPMENT	Automatic Long Overdue item status	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Evergreen Printer Options	Emily Almond – development spreadsheet entry Dawn Dale – will collect information from other systems’ solutions to specific printer issues and disseminate as necessary
SOFTWARE DEVELOPMENT	Opportunistic Holds not capturing	Emily Almond – Holds working group is currently assessing all holds issues
SOFTWARE DEVELOPMENT	Placing Holds for patrons	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	OPAC view by	Emily Almond – development spreadsheet entry

	audience feature	
SOFTWARE DEVELOPMENT	Billing Processing Time	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Number of Steps to Checkout Expired Patron	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Cursor Return to barcode entry field – processing holds	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Damaged item checkin feature	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Missing pieces checkin feature	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Patron notification history feature	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Advanced search preference default	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Punctuation in Patron Names	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Unfilled Hold Patron Notification feature	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	View of System's volume holdings	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Create New Template from Scratch feature	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Z39.50 stall in retrieval	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Automatic Volume Deletion feature	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Pop-up Warning on deletion of last item in system	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Display in order in "holding maintenance listing"	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Word Wrap in MARC entry	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	netLibrary and GADD records in catalog	Elaine Hardy – waiting for Vandelay importer/exporter interface – already in development
SOFTWARE DEVELOPMENT	Automatic Expired/Canceled holds list	Emily Almond – development spreadsheet entry

SOFTWARE DEVELOPMENT	Sort options for holds lists	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	“and/or” option for reports	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Template sharing outside library system	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Ability to edit template without cloning	Emily Almond – development spreadsheet entry
TRAINING/DOCUMENTATION	Albany as training location	Chris Sharp – in conversation with Ashley about details/dates of first set of trainings
TRAINING/DOCUMENTATION	Reports Terminology Definitions	Emily Almond – Equinox documentation should be passed to PINES as created
TRAINING/DOCUMENTATION	Printer Settings Documentation	Dawn Dale – will continue to collect and share this information as it comes available
POLICY AND/OR PROCEDURAL	Signs of progress for PINES/Evergreen	Emily Almond – manages development priorities for Equinox on behalf of PINES libraries
POLICY AND/OR PROCEDURAL	Courier issues fixed	Elizabeth McKinney – working with Assistant State Librarian Tim Daniels toward long-term statewide courier solution
POLICY AND/OR PROCEDURAL	Long overdue policy clarification	Elizabeth McKinney – will accept director requests for Subcommittee policy discussions
POLICY AND/OR PROCEDURAL	Subcommittee clarification	Elizabeth McKinney – talked to Ashley at Executive Committee meeting regarding this issue
POLICY AND/OR PROCEDURAL	Need for clarification of ID policy requirement in patron records for minors	Elizabeth McKinney – will accept director requests for Subcommittee policy discussions