



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:** January 27, 2009

**LIBRARY:** Lee County Public Library

**MET WITH:** Claire Leavy

**VERSION OF SOFTWARE:** Evergreen-ILS 1.2.3.1

ISSUES LOG	
<b>BUG / HELP DESK</b>	<ul style="list-style-type: none"> <li>- need for accounting information to be billed/reconciled by fiscal year end (more clarification is needed from Lee County Library’s financial staff)</li> <li>- need for verification of reports results that appear to be inaccurate</li> <li>- need for report on the number of patrons within home library that are on hold for a particular title (for collection development)</li> </ul>
<b>SOFTWARE DEVELOPMENT</b>	<ul style="list-style-type: none"> <li>- need for patron summary view to include notes entries (in this case, results from survey responses – legislative districts &amp; voter information)</li> <li>- need for ability to know survey ID for reporting purposes (currently library staff must request this information from PINES staff)</li> <li>- need for inventory module for Evergreen</li> <li>- need for better terminology in reports interface – current labels are not clear</li> <li>- need for more ease in ability to create reports</li> <li>- credit/debit card payments – need timeframe for implementation</li> <li>- need for spine label settings for single labels (current settings assume more than one label)</li> <li>- need a way to update OCLC upon last item deletion</li> <li>- need for a “brief record” cataloging option that records more information than current “pre-cat” items (title, author, price) – that would be specific to library organizational unit – searchable &amp; automatically deleted at check-in</li> <li>- ability to report on “brief records” once created</li> <li>- need for K-level cataloging option for videogames and other alternative formats</li> <li>- need for ability to create cataloging templates from scratch (currently catalogers must edit an existing template)</li> <li>- automatic deletion of volumes with no copies attached &amp; warning when deleting the final copy attached to a volume</li> <li>- need for way to bill patrons for copies, fax.etc – currently using “dummy cards”</li> </ul>

	<p>to track these billings, but dummy cards quickly become unusable</p> <ul style="list-style-type: none"> <li>- need for timeline on fix for Lee-Dougherty materials-sharing issues</li> <li>- need for removal of “sticky searching” functionality (or option to remove/configure)</li> <li>- need for automatic processing of long-overdue items, including patron charges</li> <li>- need for ability to notify patrons when items requested for hold are deleted and order replacement materials, etc.</li> </ul>
<b>TRAINING</b>	- need for more PINES training opportunities in the southern part of the state (below Macon)
<b>POLICY AND/OR PROCEDURAL</b>	<ul style="list-style-type: none"> <li>- ability to share reports templates across PINES</li> <li>- need for timeline on when GADD MARC records will be available</li> </ul>

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<b>RESOLUTION TRACKER</b>		
	<b>ISSUE</b>	<b>ASSIGNED TO</b>
<b>BUG / HELP DESK</b>	Fiscal Year End Billing Concerns	Dawn Dale - <b>RESOLVED</b>
<b>BUG / HELP DESK</b>	Reports Results Verification	PINES Staff – Lee County staff will open GPLS Helpdesk tickets as needed to resolve individual reporting needs
<b>BUG / HELP DESK</b>	Report of number of patrons on hold for specific items.	PINES Staff – Lee County will open GPLS Helpdesk ticket and PINES staff will work to develop a report template for this purpose.
<b>SOFTWARE DEVELOPMENT</b>	Patron summary to include custom notes field	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Need for ability to see survey internal ID for reports	Emily Almond – to be slated in software development plan

<b>SOFTWARE DEVELOPMENT</b>	Need for Evergreen inventory module	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	New terminology for reports interface	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Easier-to-use reports interface	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Timeframe for implementation of credit/debit card payment	Emily Almond – will answer based on software development plan and features of future releases
<b>SOFTWARE DEVELOPMENT</b>	Spine label settings for single labels	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Automated OCLC update when last copy on a volume is deleted	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Need for “brief record” cataloging option	Emily Almond – to be slated in software development plan – may be impacted by PINES cataloging standards and policies (Bin Lin)
<b>SOFTWARE DEVELOPMENT</b>	Ability to report on “brief records” if created	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	K-level cataloging templates for videogames, etc.	Emily Almond – to be slated in software development plan– may be impacted by PINES cataloging standards and policies (Bin Lin)
<b>SOFTWARE DEVELOPMENT</b>	Ability to create cataloging templates from scratch	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Automatic deletion of volume upon deletion of last copy on that volume	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Warning message when deleting last copy from a volume	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Need for	Emily Almond – to be slated in software development

	"generic" library card for tracking payment of copies, fax, etc.	plan
<b>SOFTWARE DEVELOPMENT</b>	Timeline for fix of Lee/Dougherty resource sharing problems	Emily Almond – will answer based on software development plan
<b>SOFTWARE DEVELOPMENT</b>	Removal of "sticky searching" functionality	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Automatic processing of "long overdue"	Emily Almond – to be slated in software development plan
<b>SOFTWARE DEVELOPMENT</b>	Automatic patron notification of deletion of item on hold request	Emily Almond – to be slated in software development plan
<b>TRAINING</b>	Need for more training opportunities in South Georgia	Chris Sharp – is developing strategic plan for PINES Training statewide, including online options
<b>POLICY AND/OR PROCEDURAL</b>	Sharing reports templates with PINES	Chris Sharp – is investigating procedures and strategies to implement this ability.
<b>POLICY AND/OR PROCEDURAL</b>	GADD/Overdrive Records	PINES Team - Executive Committee must approve batchloading procedures and technical requirements involve features not available in current Evergreen version (available in 1.4)