



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: 11/12/2008

LIBRARY: Southwest Georgia Regional Library

MET WITH: Catherine Vanstone, Mandy Chapman

VERSION OF SOFTWARE: Evergreen 1.2.3.1

ISSUES LOG

BUG / HELP DESK

- general dissatisfaction with Helpdesk response time, especially when tickets are marked "urgent" – some tickets ignored or dropped altogether – we were provided with a table with suggested minimum response times for consideration
- Mandy will review her previously submitted Helpdesk tickets for unresolved issues and will reopen or resubmit those tickets
- staff found inconsistencies in reports created with the same data and on the same templates, including state-issued templates for fiscal year reporting – there is an open Helpdesk ticket concerning this issue
- circ report requires multiple separate reports to get one number – need for a single template to get monthly circ statistics
- item attributes are lost with Evergreen server upgrades
- concern with certain voided billings that were done at unusual times (very late at night or very early in the morning) and seem to be "automatic" – some marked with "VOIDED FOR BACKDATE" – this needs clarification
- network connectivity is slow, possibly due to Albany LATA hub – replacement of equipment has been requested and is in process according to John Miller (CCG)
- Evergreen stalls upon staff login and becomes unresponsive, requiring a computer restart to recover
- reported loss of item information which requires recataloging of material
- need for Local Admin permission/ability to reassign workstations within system

SOFTWARE DEVELOPMENT	<ul style="list-style-type: none"> - question about the functionality of the “unrecovered debt” feature – will it be a staff-assigned category, or will it automatically be flagged “unrecovered debt” based on a set of parameters? if so, which parameters? - billing slowness issue confirmed – exacerbated by general network slowness reported above - need for ability to share report templates within your library system - staff requests a progress indicator when Evergreen is working - catalog searching is slow and is “repopulating” records after loading - staff uses “dummy cards” to check out computers to patrons – confirms need for “empty” Evergreen accounts (that do not accumulate circ history, etc.) for statistical reporting purposes - reports issue – parameters that were chosen for reports are invisible after reports are created – makes error tracking difficult - confirmed need for ability to change hold pick-up location after item is on hold shelf - reported problem with hold requests on “on order” items – SWGRL takes “reservations” for holds on items that are not yet received in the system. When processing these items, they are often captured for electronically-placed holds, causing problems for their “reservation” system
TRAINING/ DOCUMENTATION	<ul style="list-style-type: none"> - expressed concern about labels/terminology in Evergreen and voiced need for an equivalency chart (SIRSI -> Evergreen) - need for circ refresher training for staff – Mandy and/or Catherine will contact PINES staff to schedule this training - definition of reports parameters, for example “between” do you need to start with the date you want or do you need to begin with the date before the date you want?
POLICY AND/OR PROCEDURAL	<ul style="list-style-type: none"> - need for Catherine Vanstone to have Local Admin user profile – requires director approval - need for published PINES policy to be up-to-date and kept in one easy-to-find location - need clarification of policy that covers Georgia residents needing a library card to use any library services. We allow out of state patrons to use the computer services without having a library card. Our in state patrons should have the same option. Some libraries allow this and some read the policy to say they must have a library card if they live in Georgia. <p> Holds: </p> <ul style="list-style-type: none"> - change in number of holds printed on holds pull list from 50 to 100 has caused a strain on staff who process holds – makes PINES policy to pull all holds difficult to follow - SWGRL is the third or fourth top lender in the state – this is disproportionate to system size/budget – need for regional/LATA layer for holds capture (confirmed) - reported problem with patrons placing holds on items with multiple editions – patrons will unknowingly place holds on edition not owned by local system when a suitable alternative edition is available in system (may be a patron education issue)

RESOLUTION TRACKER		
	ISSUE	ASSIGNED TO
BUG / HELP DESK	Helpdesk Response Time	Dawn Dale – has already implemented improvements – PINES Team working to streamline requests for faster resolution and easier progress tracking
BUG / HELP DESK	Unresolved Helpdesk Tickets	Dawn Dale – Mandy will review closed tickets for unresolved issues and Dawn will assign to PINES staff as appropriate
BUG / HELP DESK	FY08 Reports Inconsistencies	Dawn Dale – will check status of Helpdesk ticket #7297 Chris Sharp – will run reports at GPLS as needed to verify results of SWGRL reports
BUG / HELP DESK	Single Circ Report Template	Dawn Dale – will assign to appropriate PINES staff – SWGRL will submit a Helpdesk ticket with desired parameters
BUG / HELP DESK	Item Attributes Lost with Upgrades	Elaine Hardy – SWGRL will open Helpdesk ticket with specific examples as found
BUG / HELP DESK	VOIDED FOR BACKDATE issue	RESOLVED – SWGRL discovered that VOIDED FOR BACKDATE appears after “checkin and forgive” function is used
BUG / HELP DESK	Slow Network Connectivity	GPLS IT - Albany LATA hub router replaced on 11/20/08 – Mandy will report back to Chris Sharp & GPLS IT regarding improvements or lack thereof
BUG / HELP DESK	Evergreen stall at login	Chris Sharp – possibly related to other network issues, but please create a Helpdesk ticket when it happens again – Dawn will assign to Chris
BUG / HELP DESK	Loss of Cataloging Information	Elaine Hardy – current example in Helpdesk ticket 7737
BUG / HELP DESK	Local Admin permission to reassign workstations	Chris Sharp – will investigate – may be a policy issue – will check with Equinox about ability to change this
SOFTWARE DEVELOPMENT	Clarification of Unrecovered Debt functionality	Emily Almond – will investigate suggested functionality and report back to SWGRL
SOFTWARE DEVELOPMENT	Billing Slowness	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Report Template Sharing	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Evergreen Progress Indicator	Emily Almond – development spreadsheet entry

SOFTWARE DEVELOPMENT	Catalog Searching Slowness	Emily Almond – development spreadsheet entry Chris Sharp – Mandy will report status after Albany LATA router replacement to rule that out as a factor
SOFTWARE DEVELOPMENT	“Generic” Evergreen Accounts	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Ability to see Report Parameters	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Ability to Change Pickup Location for Item on Hold	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Need for more usable labels/terminology in Evergreen	Emily Almond – development spreadsheet entry
SOFTWARE DEVELOPMENT	Need for flexibility in holds targeting to allow in-library non-electronic requests	Emily Almond – development spreadsheet entry PINES Team – can help brainstorm/troubleshoot workflow solutions if SWGRL would like
TRAINING/DOCUMENTATION	Need for Definitions of Evergreen Terminology	Emily Almond – will check with ESI documentation project for progress in this area and report to SWGRL
TRAINING/DOCUMENTATION	Circ Refresher Training for SWGRL staff	Chris Sharp – currently scheduling trainings in Albany sometime in January – will report back with dates. PINES Team – available for staff training on as-needed basis (staff days, etc.)
TRAINING/DOCUMENTATION	Definitions of Reports Parameters	Emily Almond – will check with ESI documentation project for progress in this area and report to SWGRL
POLICY AND/OR PROCEDURAL	Local Admin staff profile for Catherine Vanstone	RESOLVED – Helpdesk ticket #7723
POLICY AND/OR PROCEDURAL	PINES Policy Up-to-Date and in One Place	Dawn Dale – this is part of her assigned duties – will be posting to PINES information page
POLICY AND/OR PROCEDURAL	PINES Policy Clarification – Library Card	Elizabeth McKinney – will clarify policy and get back to SWGRL
POLICY AND/OR PROCEDURAL	Holds Pull List prints 100 issue	Elizabeth McKinney – will discuss policy implications of this change with SWGRL in hopes of resolution
POLICY AND/OR PROCEDURAL	Holds Issues Make SWGRL lending out of proportion	Emily Almond – holds working group is investigating all holds issues – will report back to SWGRL specifically as problems become more clear

POLICY AND/OR PROCEDURAL	Multiple editions/patron holds issue	Emily Almond –holds working group – considering possibilities of fine-tuning “meta-holds” functionality to target any print edition of an item – (development overlap)