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# EVERGREEN 2.5 UPGRADE Q&A

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THESE NOTES ARE COMPILED FROM THE QUESTIONS AND COMMENTS PROVIDED IN FEEDBACK FROM THE "WELCOME TO EVERGREEN 2.5" WEBINARS.

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## PROCEDURAL

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### **Will vendors who use SIP to authenticate patron accounts be able to do so during the upgrade?**

No and yes. Live authentication is not an option during the upgrade. If your vendor has the option to locally store authentication information (like OverDrive) extracted via SIP on their servers, then service may continue uninterrupted by authenticating against their records. If your vendor does not offer an offline option, then that service will be restored when the system goes live again on the 17<sup>th</sup>.

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## SOFTWARE

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### CIRCULATION

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#### **Can you use "Print Item Receipt" for more than one item?**

Yes, the interface lets you pick and choose among the items circulated.

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## CATALOGING AND Z39.50

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#### **When will the MARC field stripping be live?**

We expect to have it up and running by the end of February 2014.

#### **Will we be able to perform retroactive field stripping?**

Probably, but not automatically using the staff client. Retroactive stripping will have to be done by scripting by our support team. We may be able to coordinate the process later this year.

#### **Are there changes to the Z39.50 import interface?**

No changes noted so far.

### **Can we still use copy buckets?**

Yes. The only change to copy buckets is the added warning.

### **What about using Record Buckets and Z39.50 to update stub records?**

That interface is still in configuration and requires the use of the Vandelay matching system. We do not use Vandelay matching due to the current failure rate. We are evaluating the module to determine if and when we could implement it.

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## HOLDS

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### **Is the configuration of the Simplified Holds Pull List column picker tied to the workstation, user or location?**

The workstation.

### **Can we revise and change the settings on the Simplified Holds Pull List once set?**

Yes. You can configure and reconfigure as often as needed to optimize it for local workflows.

### **Do we have to click anything to get the patron data to populate in the staff client when placing a hold?**

Once you enter the barcode and tab out of the box, all of the information for that account should autopopulate.

### **If a patron is issued a new card, do we have to transfer their holds?**

No. If you "Replace Barcode" in the user editor, the system automatically reassigns the correct library card.

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## ITEM ATTRIBUTE EDITOR

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### **Will our existing item attribute templates still be available?**

Yes. They will pass with your other workstation data.

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## ONLINE CREDIT/DEBIT CARD PAYMENTS

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### **Does our library have to pay for our patrons to use the online payment option?**

No. This is a service provided by the Indiana State Library and is subsidized with the convenience fee. (See below)

**We offer an in-house credit card payment option. Do we have to change how we handle that currently?**

No. You may continue to follow local policy for credit/debit card payments made using your local vendor contract.

**Can a patron pay just part of his/her bills with the online payments?**

No. If the patron wishes to pay his/her bills online, they must pay off the full balance owed plus the convenience fee.

**If a patron pays off his/her bills, will they then be able to renew overdue materials online?**

Yes, if there are remaining renewals. If the patron has reached the end of his/her renewals, fines will continue to accrue even if they pay their bill.

**If a patron is barred or expired, may the patron pay his/her bills online?**

No. Inactive/expired and barred patrons are blocked from logging into their My Account and so won't be able to pay online. Libraries may arrange with barred users to unbar an account for a limited period of time to allow a payment to be made. Expired patrons are instructed to contact their library to reactive their account.

**How much is the convenience fee?**

The convenience fee is 2.25% of the total bill being paid with a minimum fee of \$1.00.

**What types of credit and debit cards can our patrons use?**

The online payment system will accept MasterCard®, Visa®, and Discover® branded credit and debit cards. We are not accepting unbranded bank cards or American Express cards at this time.

**How are the online payments processed and when will we get our money?**

The ISL will perform all of the bookkeeping on the original transactions as if the bills were paid at one of our desks. The monies will then pass from the ISL to the appropriate libraries as part of the quarterly intra-Evergreen payment.

**How will online payments affect our collection efforts with Unique Management?**

Unique Management pings the servers daily to confirm the status of accounts on which they are pursuing collection efforts. If a patron pays their bill online, it will be reflected as paid and in good standing with Unique's records.

**When will online payments go live?**

Online bill pay was schedule to be an option once the servers are back online on February 17, 2014. We have decided to postpone until the next week to ensure that payments are processing correctly with the new server build.

## OPAC – GENERAL

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### **When will we see the expanded OPAC enrichment content?**

We are slated to go live with the expanded content in October 2014.

### **Are 880 fields searchable in addition to being visible?**

No. They are not currently part of the basic or advanced search algorithm.

### **Are both the 264 and the 260 (Publication information) fields shown in the physical description?**

Yes, the software accommodates both the AACR2 and RDA field entries.

### **Will Blu-rays have their own search option separate from other videorecording formats?**

Not yet. Once the MVF development is complete (aka the Icon Project), we will be better able to make that distinction. It was announced as a probable element in the 2.6 release later this year.

### **Will consortially available econtent records be excludable from search results?**

Not yet. Once the MVF development is complete, and the URL verification module is fully integrated, we may be able to move forward on that.

### **How does shelving location search work if there are multiple branches?**

Because shelving locations are considered tied to the physical building in which they are found, when a patron elects to search by a system or the consortium s/he won't be given the option to limit the search by shelving location. Shelving location search limits are only an option if the user selects a specific branch location to search.

## PUBLIC COPY NOTES

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### **Now that copy notes are visible, are they searchable too?**

No, but it's on our list for development.

## SERIES

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### **What fields are used to display series information?**

490 and 830.

## USER MAINTENANCE

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**Does clicking on the barcode or phone number in the patron summary do anything other than copy it to your clipboard?**

No, it simply no longer requires a click-to-confirm dialog to complete.

**Is the list of past and present library cards editable? If someone finds an old card after losing a new one, can we just reinstate the old one this way?**

No, but it appears that there may be development in that direction in future.

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## WORKSTATION SEARCH PREFERENCES

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**If set, do the workstation search preferences override those of the user?**

Yes.

**Is it possible to lock workstation settings so that a staff member doesn't accidentally change settings for other users?**

This does not appear to be an option currently, but we're looking into it.