EVERGREEN 2.7 UPGRADE Q&A

THESE NOTES ARE COMPILED FROM THE QUESTIONS AND COMMENTS PROVIDED IN FEEDBACK FROM THE "WELCOME TO EVERGREEN 2.7" WEBINARS.

PROCEDURAL

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 28th.

How do I correct my hours and contact information on my Library Information Page?

Either email Anna or place a HelpDesk ticket to update your information. Please be aware that if you check your information on the testing server (dev.evergreen.lib.in.us), we will only be updating the live server, so you won't see a difference on the dev site. You are encouraged to check your information again immediately following the upgrade to confirm its accuracy!

SOFTWARE

CIRCULATION

None so far!

CATALOGING AND Z39.50

Are there changes to Z39.50 importing?

No.

Is there a template we can run locally that will report on records that are missing 007s?

No. Because it's a 2-factor report, the HelpDesk team have to run it for you.

HOLDS

Can you pick multiple formats in metaholds?

Yes. Ctrl-Click to select multiple formats in the place hold interface.

If I place a metahold, is it possible to get materials in languages I don't know by accident?

Yes. You should select your language option(s) if there are multiple options. Otherwise materials in *any* available language may be targeted.

ITEM ATTRIBUTE EDITOR

Will our existing item attribute templates still be available?

Yes. They will pass with your other workstation data.

OPAC – GENERAL

How does are groups formed for group searches and holds?

The system creates a "fingerprint" consisting of the normalized content of the 245 $a and 100 $a and matches records on that fingerprint. We will be reviewing with the Cataloging Committee how to exclude materials that are incorrectly grouped with these criteria.

Is grouped search checked by default?

No. It's an option just like "Available Items" and must be selected each time you build a search.

Can you select "Group Formats and Editions" in Basic Search?

No. It's an option in the Advanced Search and from the search results pages.

If we don't have duplicate records, why would we want to group them?

In this case, the groups include editions with slightly differing elements (different publishers, page counts, hardcover vs paperback, etc.). The bib records aren't duplicated, but the content is. Grouping makes it easier for patrons to obtain a copy quickly when a specific edition isn't a priority.

Can you pick multiple formats in metaholds?

Yes. Ctrl-Click to select multiple formats in the place hold interface.

Can you click on an icon to limit the search by item type?

No. Faceted search may become an option down the line, but for now the icons are just a visual cue of type.

Will we still be able to search by shelving location?

Yes. We know this is a priority for our libraries and have included this customization in 2.7.

If you use notes on your My Lists, can you delete a portion of them?

Yes. The notes are editable.

Can we keyword search by ISBN?

You can try, but we recommend using the numeric search for best ISBN search results.

Is there a way to exclude eresources which my library doesn't own from search results?

The new format filters should greatly reduce the number of eresources that are returned on a print search, but we cannot guarantee that miscataloged items will not appear on occasion.

REPORTS

When will the updated documentation on reporting be available?

We are targeting release of the new manual for next spring.

When will the online class for reporting be available?

We are targeting release of the new online class for next spring.

When we clone a report (Save as New), can we rename it?

Yes.

When are the core reports going to be available?

We continue to discuss what reports all members would benefit from utilizing. There is a continued lack of consensus on what elements should be included in each report.

Will parts reporting be updated?

There will be very few changes to the reporting view tables. "Parts" has not been listed in any of the available documentation, but we will be happy to revisit this once live.

SERIES

Will Series Search work now?

We are working on local patches to repair this functionality, but you may still have difficulties with the series search in 2.7.

Does the one-click Update Expiration Date mean I don't have to open up the Patron Edit interface?

No, the button is found in the Patron Edit interface, and you should still be updating the rest of the patron record when you renew their privilege.