
EVERGREEN 2.9 UPGRADE Q&A

THESE NOTES ARE COMPILED FROM THE QUESTIONS AND COMMENTS PROVIDED IN FEEDBACK FROM THE "WELCOME TO EVERGREEN 2.9" 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.

When will we be on standalone?

Plan on using standalone for any time your library is open between 9pm EST December 30, 2015 and 8am EST January 4, 2016.

SOFTWARE

ACQUISITIONS

Where are we with acquisitions?

We are in the pilot configuration stage. If your library would like to join the pilot group, please let Anna know. Priority will be given to libraries with past ILS acquisitions experience.

CIRCULATION

None so far!

CATALOGING AND Z39.50

None so far!

HOLDS

Can patrons place multiple holds against a bib record?

No, only staff have access to the new “Place another hold on this title” link.

OPAC – GENERAL

How do patrons turn on circulation and hold histories?

In My Account, patrons should visit Account Preferences, click on the subtab for Search and History Preferences and tick the boxes next to “Keep history of checked out items?” and “Keep history of holds?” Then click on Save! This is not retrospective and will only store transactions created after turning these features on.

PATRON MESSAGE CENTER

What staff-side interface do we use to generate patron messages?

From the patron record, use Notes to create Patron Visible notes that will appear in the Message Center.

Can we see if the patron actually reads the notes?

Yes, when a message note is viewed, a timestamp is populated in the staff-side Message Center interface.

Can we see all notes associated with a patron regardless of the issuing library?

Yes, use the org unit dropdown to view messages issued by other branches or the consortium.

SEARCH

Are there any significant changes to search as part of this upgrade?

No, there are no changes on the software end of things. We expect to implement Authority Control in 2016 which will improve subject searching results, but that will take place later in the year.

WEBCLIENT

How do I access the webclient?

The webclient may be accessed at: <http://evergreen.lib.in.us/eg/staff/>. Remember to coordinate with your localadmin to register your workstation!

How is the webclient different from the staff client?

The webclient is an in-development version of the staff client that may be used in the web browser of most internet enabled devices, including laptops, tablets, and smartphones without requiring software installation. It is not a full substitute for the staff client, so be sure have a backup plan if the function you wish to use is not currently available in the webclient.

Should we be using the webclient for all circulation functions?

Not necessarily. Since it is still in development, some functions are limited or may exhibit bugs. You should feel free to begin using it, familiarizing you and your staff with the new workflows, and experiment to see how a portable workstation can be of use at your library. We do not recommend relying solely on the webclient for circulation functions at this stage though.

Who can register a webclient workstation?

Just like the staff client, only your localadmin can register a webclient workstation.

Does the webclient have the ability to access your mobile device's camera so it can be used for scanning barcodes?

Not at this point.

Can we use the webclient to do remote registrations?

Yes.

In the webclient, where do we find the Holds Pull List?

It appears in the Circulation menu.