EVERGREEN 2.11 UPGRADE Q&A

THESE NOTES ARE COMPILED FROM THE QUESTIONS AND COMMENTS PROVIDED IN FEEDBACK FROM THE "WELCOME TO EVERGREEN 2.11" WEBINARS.

PROCEDURAL

When will we be on standalone?

Plan on using standalone for any time your library is open between 6pm EST December 31, 2016 and 8am EST January 2, 2017.

SOFTWARE

HOLDS

Can patrons place multiple part holds against a bib record at once?

No, but we have recorded this as a wishlist development item!

Has the Simplified Holds Pull List been updated so it doesn't time out?

There have been no updates to the staff client pull list options for this upgrade.

OPAC – GENERAL

What is the retention period for circulation histories?

For patrons with personal circulation histories, it is available indefinite as long as the patron has the setting turned on.

For staff, it is generally 3 years.

PERMISSIONS UPDATE

What does scoping mean?

Scoping refers to the extent to which a given user may affect patron, item, or bib records. For example:

Circulation staff have permissions scoped to consortium level for editing patrons so that they may add notes, update contact information, and renew privilege for eligible visiting patrons.

Catalogers have holdings maintenance permissions scoped to system level because they are only eligible to add, edit, and delete materials owned by their libraries.

REPORTS

Are we no longer going to be able to run reports on patrons' circulation histories?

You will only have access to the non-anonymized data for reporting.

SEARCH

Are the new search filters available in both the client and the catalog?

Yes.

Can the new search filters turned on by default?

No, but we've recorded a wishlist item to have this be available as a patron setting.

Can the new Popularity sort order be made the default?

Yes, but until we finish configuring the definition of Popularity and confirm it, we'll retain the old Relevance option as the default.

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?

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 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 look for duplicate patron records?

Yes.

Is the webclient going to replace the staff client, or will both continue to be available?

Ultimately, the staff client will be retired and only the webclient will be available. We don't have exact dates because we're waiting on some development, but we will likely retire the staff client in EI in the next year or two.

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