



SAGE LIBRARY SYSTEM

Status Report

Brent Mills • 11.05.2015



General System Updates

- **Sip Server Update**

New version with better security checks and resource consumption

- **Operating System Updates**

Necessary for continued Evergreen service in future version upgrades

- **Security Updates**

Removal of insecure protocols, addition of newer, secure TLS variants. Git backups of critical Evergreen data now supplement regular database backups

- **Database Updates**

Reduction in size, cleanup of unused, legacy sections



Training Goals

- Reports Training (2 parts)
- Local Administration Training



Reports Training

- Decide on acceptable dates. An in-person session would be the best.
- 1st Part
 - What login to use? Setting up reporting folders, Running a pre-set report, Accessing past reports, Emailing reports, Automating report generation, Deleting old report outputs. Go over existing Sage YouTube report overviews
- Break
- 2nd Part
 - Brief overview of relational databases for purposes of selecting correct options from the reporting “Sources”.
 - Creation of custom reports using an existing template to add additional fields or filters.



Local Administration Training

- Set Date - In-person would be best, could coincide with Reports Training
- Overview of general local admin features available for library directors or designated PIC for branch libraries.
- Setting Closed Dates, Editing Shelving Locations, setting/viewing “Library Settings” for your system, Setting group penalty thresholds, setting up Evergreen Self-Check stations & more
- Receipt Printing Overview
 - Custom options explanations
- Review procedures during an Evergreen upgrade
 - Offline Transactions, Uploading Transactions
 - Downloading new staff client / update local desktop aliases



Proposed Sage- Wide Setting Changes

For Library Settings

- Hold Expire Interval
- Disable Patron Credit



Library Setting:

Hold Expire Interval (unset at Sage level)

Description: Amount of time after a hold is placed without being filled before the hold expires. Example "100 days"

Proposed Value = 2 months (or whatever is deemed most reasonable)

Reason = Per Dan's first question, this would set a limit on how long holds will wait to try and find a target. Unless Baker scans in the lost copy or adds another copy on the same call number, the hold will be in limbo. Setting a date limit would allow for two things:

- Evergreen to cancel the hold at the set limit date
- Send an email alert to the patron letting them know that the hold was cancelled due to lack of finding a target



Library Setting:

Disable Patron Credit (unset at Sage level)

Description: Do not allow patrons to accrue credit or pay fines/fees with accrued credit.

Proposed Value: True

Reason: We have found issues with patron credit in regards to clearing negative balances on bills, along with the additional option of "Convert change to patron credit".

(Are many libraries actively using Patron Credit as a payment option?)



Future Upgrades

Evergreen Upgrades

- Upgrade to 2.9.x (most stable point release) when becomes available.
- Investigate Google Analytics usage for catalog.sage.eou.edu

Upgrade of Database Server

- Most stable, recent version of Postgresql (9.4.x)
- Upgrade OS to most recent version of Linux (14.x.x)



Dan's Question 1



1. I requested the following CD in October. At the time, the computer showed Baker County had the item. However, when Baker County went to retrieve the item it was unable to be found. Baker County change the status of the CD to Lost or Stolen and the item became "unholdable". The only reason I found out that it wasn't coming is I went looking for it online. However, in my account, the status of my hold was never changed. I looked today and the CD record has apparently been removed. (It was there when I first looked for it.) Is there something that can be done to change a hold status in one's account when an item is no longer available and be notified of the change?

Issues -

- Hold no longer has a target (potentiality of new copy coming on is low).
- There is only one copy that could possibly fill the hold, plus the hold is a "Volume" hold, meaning any new items that could fill the hold would have to be attached to the same Baker call number.

Possible Solutions:

- Regularly run the Hopeless Holds Pt1/Pt2 reports in: Shared > bmills > ILL/Hold and Transit Reports
- Compare the TCNs from both reports.
- If the hold TCNs for your library (part 1) match the "Sage's unfillable for now" TCNs (part 2) alert your patron and either cancel the hold or find another suitable target for their hold.
- OR/AND Set a hold expiration interval → Receive email when hold sits unfilled for set period of time.



Thank You

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