Sitka’s Staff Documentation

Sitka's staff Documentation

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Introduction

New Staff Orientation

All new staff should read the following:

- About the Co-op
- Tools and Systems
- Procedures and Expectations
- Security Advisory

Co-op Support Staff

- Co-op Support Services

Tickets

Chapter 1. Request Tracker

"RT" stands for "Request tracker". It’s an open-source tool that the Co-op uses to track and manage communications.

1.1. Settings

Settings

1. RT at a glace - Home page refresh interval
2. Ticket Display - Notify me of unread messages
3. About Me - Signature

   image::images/Intro/signature.png [Signature]

4. Queue List - Select queues to be displayed on the **RT at a glance** page

1.2. Home Page

Co-op staff can configure RT as needed. Ask for help or share ideas for dashboards etc.

RT at a glance: body

RT at a glance: sidebar

1.3. General RT Guidelines

In addition to RT’s auto-reply we strive to respond to sites within 24 hours of receiving a ticket (even if only to say we’re working on it).

- Use Reply to respond to all Requestors. Replies are visible to sites on RT self serve site, and all requestors receive Replies automatically via email.
- Use Comment to correspond with Co-op staff. Comments are not visible to sites on RT self serve site, and requestors do not receive comments unless intentionally ccd.

Comment function is for internal communication. You can post a comment and pass the ticket to another owner, or post a comment and keep ownership. Usually, if you require someone to do an action on the ticket you should pass the ownership to them.

To add a Comment:

1. Click the Actions drop menu on the top left navigational menu for the ticket.
2. Select Comment
3. Enter the comment into the comment field, and cc the person you want the comment to go to (this is not needed, but will ensure the comment goes into their inbox and can help guarantee they recieve it.)
4. Change the owner in the Ticket and Transactions area to the person you need to pass the ticket

to

1.3.1. Custom fields

In the main queues there are a variety of custom fields. These can vary by queue.

- Tags - what the ticket is about. These are customizable by queue.
- Library - the requesting library. Currently global, shared by all queues.
- Other custom fields in use are for tracking things like LP bugs links, Bibliocommons tickets links, servers affected, etc.
- Tickets should have one or more values assigned to each field (ctrl+click for multiple values) to improve searching and help track support trends.

Adding to custom field menus when a new library joins or a new tag is required,

1. Log into RT and click *Configuration* from the top menu bar
2. Select *Custom Fields*, then choose *Library* or *Tags* (under *Custom fields for tickets*)
3. Scroll to the bottom of the page to add a new value

1.3.2. Assigning RT priorities

Urgent Fatal failure across services or one entire service. Constitutes emergency support if after hours.

If - All sites affected If - Data loss or severe data corruption If - Co-op Servers down e.g. in Sitka core services stopped like circ, search, communication between servers that comprise Evergreen broken, or, for e.g, in LibPress all websites are down. If - Restart required for core services to be restored.

High Due to Failure of service or current prioritization of outcome (e.g. new service, new member expectations). May constitute emergency support if after hours.

If- Tickets from a new site that are affecting staff workflows If - tickets are a result of roll out of new version or new service /feature/function. If - Majority of sites affected (emergency support may have to kick in) If - Core services affected (emergency support may have to kick in) If - Service restart required for core services to be restored (emergency support should kick in) Examples: servers offline, email failure, holds targetter failure, Evergreen reporter offline, upgrade related patches or roll ups.

Medium If- Affects one or more site If - Costs site time/money, affects core public service workflows, or affects communications with their patrons (i.e. overdues not running, problem with fine generator, web site forms not working, etc.) Is a contractual obligation on Co-op's part – i.e. required for Co-op services to perform as per contracts and policy. e.g. MOU/SMA, is not fatal, but needs attention. Failure to provide a required outcome of the service, but not fatal. Examples: new site waiting for overdues to be set up, new site's fines not charging correctly, , OPAC display problems affecting most sites, EZ Proxy changes, for LibPress, basic website functionality affected or fixing menu links.

Low If- “How to” questions If -Can be resolved by information, or a scheduled chron job ,or by development,or a workaround. If -Things that need to be done, but don’t affect daily operations at all If- Affects one or few sites only, nice if it worked. Examples: cataloguing questions, policy questions, functionality questions, bug reporting, feature requests,

1.3.3. Assigning Tags

Purpose of the Kudos Tag The Kudos Tag is intended to make ticket searchable where the service a member has received has prompted them to specifically call out the service they have received. The kudos in the ticket can then be used in performance reviews to highlight accomplishments and testimonials to promote our services (with the author’s permission).

Criteria for Applying the Kudos Tag The Kudos tag should be used when extra appreciation is shown for: * the assistance received from a specific staff member * general thanks to the team or the Co-op * appreciation for new features, updates to a service

1.3.4. Using My Reminders in RT

Each RT ticket has a Reminders section where you can type in reminders for yourself if you want. These Reminders will appear on your RT homepage (My Reminders area) so you can easily view and monitor them. It can be used like a checklist of to-do’s.

1. When you open a ticket there is a section for Reminders near the top right hand side of the ticket.
2. In the Subject box type in the Reminder you want to set
3. When you select the Due box it opens a drop box calendar you can navigate and pick the date the reminder is due. Or you can manually type the due date
4. When you are done simple select Save and the Reminder will appear in the ticket. If you RT homepage is set up to include Reminders it will appear there as well.
5. When you are done that task simply select the Reminder in the ticket, and hit Save and the Reminder will be resolved.
6. You can also select the Reminder from the My Reminder area of your RT homepage. This will take you to a new window for that Reminder, and the process to resolve is the same as above.

1.3.5. Bookmarking tickets

Sometimes you may want to keep track of a ticket that you do not own. You can bookmark a ticket by opening it up and clicking on the star icon (it will turn yellow) in the top right menu. These bookmarked tickets should appear on your RT homepage under My Bookmarked Tickets. When you don’t want to track the ticket anymore, simple reselect the star icon and it will turn back to grey.

1.3.6. How to Create a Ticket in RT

On your RT homepage, at the top right of the page, in the blue bar, there is a darker blue New ticket in button don’t select the button. Beside this button is a white drop down menu. Open the dropdown menu and select the type of ticket you want to create.

There are queues: Sitka Support: Testing:

In the Subject line of the ticket enter the name of the book or title for the ticket you are creating. In the Basics area on the right, set the owner to the appropriate person. In the Custom Fields area on the right, you only need to set these fields (using the above instructions): Switch to the Details button at the top right corner and set the following fields: Set the Priority (using the above instructions). Once all is good, click Create. The ticket should appear in the appropriate queue.

1.3.7. Guidelines for Ticket Responses

When responding to a support ticket the most important information should be in the first sentence/paragraph of the response. This is often an answer to a question, an action the library needs to take, or a request for additional information. You can add more details in subsequent paragraphs but should stick to the essential details. You can always expand on your answer in future responses if needed.

Key things to remember:

- Stick to the important information.
- Don’t overwelm with information.
- Know your audience - what type of library are you communicating with, what level of technical skill are they likely to have.
- Think about your tone - be sure to communicate at an appropriate technical level.
- Use numbering when providing steps.
- Don’t use jargon.
- If you’re using an acronym (like BC ILC) spell it out the first time (BC Interlibrary Connect) unless you’re sure the person you’re corresponding with knows the acroynm.
- Quality answers are usually more efficient than quick answers and often it’s ok to spend some time researching the answer before responding.
- We make recommendations on how the library should use the ILS and remind them of policy but the library is ultimately responsible for ensuring they are following Sitka policies and the terms of their service management agreement.

Chapter 2. Bounced Mail

Process to Deal with Items in Bounced Mail Queue

1. Ticket is received in Bounced Mail Queue
2. Determine the type of bounce (SMS Hold Notification, Report Notification, Out of Office, Password Reset Request, Co-op Website, Other)
   a. SMS = Notify Library
   b. Report = Notify Library
   c. Out of Office = Ususally just delete, but read the message first, if it is an extended absence remove from mailing list
   d. Password Reset Request = Notify Library
   e. Co-op Website = Notify appropriate group
   f. Libpress Event = Usually just delete
   g. Other = we have outlined the most common instances of bounce mail here, other scenarios will need to be handled as they arise (document issue & resolution here if it is something that may happen again)a

Evergreen SMS

1. Edit Subject Line
   a. Add library short code to the beginning
   b. Add SMS to the end
   c. ex. BSQ - Undelivered Mail Returned to Sender - SMS
2. Add Library as Requestor
3. Email the patrons library to follow-up
   a. Specify Patron First Name (easier for Libraries to follow-up)

Hello,

We received the following failure message for a Text message hold notification for one of your patrons. Please follow up with your patron to let them know that the hold is available for pickup and verify the phone # on file.

Evergreen Reports

1. Edit Subject Line
   a. Add library short code to the beginning
   b. Add Reports to the end
   c. ex. BSQ - Undelivered Mail Returned to Sender - Reports
2. Add Library as Requestor
3. Email the patrons library to follow-up

Hello

We received the following report completion notification as a bounced email.

Email sent to {Insert Email Address}

{Insert Report Details}

It appears as though the email address was maybe entered incorrectly. If this is a recurring report, you will need to delete the exisiting report and set it up using the correct email address.

Instructions can be found here http://docs.sitka.bclibraries.ca/Sitka/current/html/recurring-report.html

Please let us know if you have any questions.

Evergreen Notification

1. Edit Subject Line
    a. Add library short code to the beginning ex. BSQ - Undelivered Mail Returned to Sender
2. Add Library as Requestor
3. Email the patrons library to follow-up

Hello

We have been receiving your libraries bounced emails for automatically generated patron notices (e.g. email overdues, email holds notification). These bounced emails are caused by patrons with incorrect email addresses or problems with the patrons' mail servers.

In order for you to receive these emails you will need to add an email address to the "sending email address for patron notices" setting in the Library Settings Editor in Evergreen.

You must be logged in with a Local System Administrator account to complete the following

- Click on Admin
- Select Local Administration
- Select Library Settings Editor
- Choose your Library in the Context Location (this will default to the location your workstation is registered to)
- Search or Scroll to find the setting "Program: Sending email address for patron notices"
- Click on Edit
- Choose your Library in the Context field (this will default to the location your workstation is registered to)
- Enter the email address in the Value field
- Click on Update Setting

It is good practice to set up a generic account, like info@nameofyourlibrary.ca, so that one person’s individual email inbox doesn't get cluttered with emails that were not delivered.

Please let me know if you have any questions.

Website

1. Follow-up with the appropriate Group (NNELS, Licensing, LibPress)

Auto-Reply / Out of Office

1. Read the message if regular vacation - Just delete the ticket
2. If extended Out of Office (Parental Leave / Sabbatical) - Remove from Email Group

Password Resets

1. Edit Subject Line
    a. Add library short code to the beginning
    b. Add Password to the end ex. BSQ - Undelivered Mail Returned to Sender - Password
2. Add Library as Requestor
3. Email the patrons library to follow-up

Email the patrons library to follow-up

Hello,

Your Patron {Insert Patron Email address} has requested a password reset, but the request was bounced back to us, most likely due to an invalid email address. Please follow up with the patron to reset their password and verify the email address in the Patron account.

Chapter 3. Feature Requests

Feature request = a system change or enhancement requested by a Sitka Site.

Process

1. Ticket is received
2. Make sure request includes all necessary information, make sure we have a clear understanding of what the library is asking for - email library for clarification if required
3. Include descriptive subject line.
4. Specify "Feature Request" in subject line.
5. Add appropriate tags
6. Search RT for existing tickets - link or merge as appropriate
7. Search Launchpad for Bug or Wishlist Item -
8. If no existing bug / wishlist item, create one
9. If there is an existing bug - Select "This bug affects you"
10. Add launchpad bug # to RT Ticket
11. If indicated on Launch pad - include expected release in RT Ticket
12. Move to Feature Request Queue
13. Set ticket priority
    a. Low = 1 library request, or obscure feature (may be related to workflow, or library process)
    b. Medium = +1 library request, or useful feature that more sites will benefit from
    c. High = +1 library request, Interrupts workflow, or is a bug that requires significant development to resolve.
    d. Urgent - important or essential feature lost through upgrade
14. Email library to advise issue has been put in feature request queue
15. Include information about status (Launch pad / Sitka Development work)

Chapter 4. Sitka Bugs

Sitka Bug = an issue with Sitka’s Evergreen that requires development

Bugs are tracked separately from other support requests.

Process

1. Ticket is received
2. Make sure request includes all necessary information, make sure we have a clear understanding of what the library is asking for - email library for clarification if required
3. Include descriptive subject line.
4. Add appropriate tags
5. Search RT for existing tickets - link or merge as appropriate
6. Search Launchpad for an existing bug.
   a. If there is an existing bug - Select "This bug affects you"
   b. If no existing bug, report the bug.
7. Add Launchpad bug # to RT ticket
8. If indicated on Launchpad - include expected release in RT Ticket
9. Move to Sitka Bugs Queue
10. Set ticket priority
    a. Low = 1 library request, or obscure feature (may be related to workflow, or library process)
    b. Medium = +1 library request, or useful feature that more sites will benefit from
    c. High = +1 library request, Interrupts workflow, or is a bug that requires significant development to resolve.
    d. Urgent - important or essential feature lost through upgrade
11. Email library to advise issue has been put in feature request queue
12. Include information about status (Launchpad / Sitka Development work)

Must have a Launchpad Bug # Must have a Priority Must have a Bug Tag

- Waiting for upstream fix = a bug waiting for an upstream fix
- Community fix available = a bug with a community fix available for testing (Flag for Bug Squashing week etc)
- Test in 3.next = fix committed upstream - needs to be tested on Sitka’s Evergreen test server
- Fixed in 3.next = tested and confirmed fixed on Sitka’s Evergreen test server

NOTE	There should only be one ticket for each bug - duplicate tickets (other tickets regarding this issue) should be linked & resolved with resolution = upstream.

Chapter 5. Tickets for contact Changes

5.1. Email changes

1. Library staff
   a. Evergreen staff account
   b. Co-op Web
2. Library Main Email
   a. Co-op Web
   b. RT
   c. LibPress
   d. Evergreen Server Admin → Organizational Units
   e. Evergreen Library Settings Editor → Sending email address for patron notices
   f. Evergreen Paper Overdue notices

5.2. Website URL Change

- Current Sitka Libraries - https://bc.libraries.coop/services/sitka/current-sitka-libraries/
- Public Catalogue - Library Home link
- Evergreen Paper Overdue notice template

Phone Support

Chapter 6. Phone Support

Phone #: 1-888-848-9250, call routing and voicemail boxes for Sitka, LibPress, Licensing, NNELS, Co-op Web and Emergency support.

Phone Support hours: Monday to Friday, 9am–4pm PT except BC statutory holidays. After hours emergency support available via phone 7 days per week.

6.1. Queues

1 - Sitka 2 - LibPress 3 - Licensing 4 - Co-op Web 5 - NNELS 9 - Emergency Support

Log in / Log out instructions

use button for VOIP

1. Dial 11
2. Enter queue # 11
3. Enter password

You must log in to each queue individually everyday. You may find that sometimes the login persists but it is not reliable. Please log in everyday.

6.2. Answering Calls

1. You are expected to respond professionally and promptly by providing needed answers, documentation, and troubleshooting tips.
2. If you get reports that the system is down you must notify the rest of the Support team via Co-op Support chat in Teams as soon as possible.
3. Thorough and consistent reporting makes it easier to document request history. Please create a ticket for every call you receive.
4. If you're going to be AFK for an extended period please arrange with your backup person to cover phones.

6.3. General

If you get reports of access issues from within the library, please ask for their external IP address - https://whatismyipaddress.com/

6.4. Sitka

Providing needed answers, documentation, and troubleshooting tips

Create a ticket in Sitka Support queue

1. Contact Information: Please include the caller's name, their library, and an email address where we can contact them.

2. Descriptive subject. To make tickets easier to identify in RT please provide as descriptive a subject as possible.
3. What, where, when, how? Be specific about what they were doing in Evergreen, what results were obtained versus what was expected, and the steps required to reproduce the problem. If you cannot reproduce the problem exactly please describe the circumstances in which it occurred and the symptoms observed, including relevant patron and item barcodes.
4. Include error messages. If the problem caused any OPAC or staff client error messages please copy and paste error text or attach screenshots when possible. See the section called “Submitting Files to Support” for guidelines.
5. Include example barcodes and IDs. A problem in circulation? Make sure you include the patron and/or item barcodes that were in use when the problem occurred. Cataloguing issues? Make sure you include the item barcode and/or the record ISBN/ISSN or record ID where the problem occurred.
6. Troubleshooting. Include the steps you have already taken to try and resolve the problem.
7. Do NOT include passwords. Co-op Support should never ask for patron or staff passwords.

6.5. Libpress

Providing needed answers, documentation, and troubleshooting tips

Create a ticket in Libpress queue

1. Contact Information: Please include the caller’s name, their library, and an email address where we can contact them.
2. Descriptive subject. To make tickets easier to identify in RT please provide as descriptive a subject as possible.

6.6. Licensing

Create a ticket in Libpress queue

1. Contact Information: Please include the caller’s name, their library, and an email address where we can contact them.
2. Descriptive subject. To make tickets easier to identify in RT please provide as descriptive a subject as possible.

6.7. Co-op Web

Create a ticket in Libpress queue

1. Contact Information: Please include the caller’s name, their library, and an email address where we can contact them.
2. Descriptive subject. To make tickets easier to identify in RT please provide as descriptive a subject as possible.

6.8. NNELS

Usually these calls are from patrons

1. advise them to contact their local library
2. Advise them they can request a NNELS account
    a. https://nnels.ca/organizations/search
3. Take their info and create a ticket in NNELS Queue
    a. Who, what, where, when, why, how?

Others . If the caller indicates they are looking for info to "send discs back" they are likely looking for CELA .. Give them the # for CELA = 1-855-655-2273 .. https://celalibrary.ca/about-us/faq-cela

Tier 1 Support

Chapter 7. Supporting Sitka's Evergreen

7.1. Sitka Staff account

Sitka Staff permissions are the highest level permissions and can do almost anything in the staff client for any library.

NOTE	With great power comes great responsibility.

7.2. Logging Into Evergreen

Choosing a workstation

- All patron / staff account tickets will require you to login to a library specific workstation location
- Admin / policy tickets can be done from any workstation location

Chapter 8. Library Staff accounts

Library staff accounts are the same as patron accounts with two differences.

1. Staff accounts use Main (Profile) Permissions Groups with permissions that give access to Evergreen's staff functions.
2. Staff accounts have working locations which tell Evergreen which libraries or branches an account can be used at.

Related Chapter in Sitka's Evergreen Documentation

NOTE	You must log in using a workstation registered to the requestors home library for all Library Staff related tickets.

8.1. Grant Local System Administrator Permissions

The Local System Administrator permission group can only be assigned by Sitka Staff. Libraries may create an account using any permission group and then submit a support request for local system administrator permissions.

process

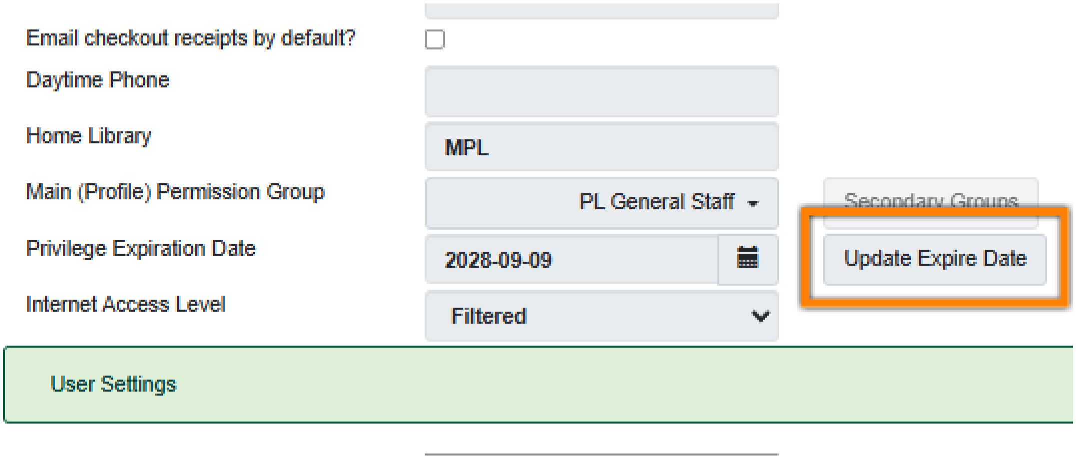
1. Log in using a workstation registered to the requestors home library.
2. Go to **Circulation** → **Check Out.**
3. Retrieve account using account barcode (or Patron Search).
4. Check the **User Permission Editor** to verify the account has a working location.
5. Check to make sure the account has an email address.
6. Edit → Change **Main (Profile) Permission Group** = Local System administrator.
    a. Make sure to choose the correct group by library type (Public, Post-Sec, Special or Government).
7. Click **Save.**

8.2. Renew/Edit LSA Account

The Local System Administrator permission group can only be edited by Sitka Staff

Process

1. Log in using a workstation registered to the requestors home library.
2. Go to **Circulation** → **Check Out.**
3. Retrieve account using account barcode (or Patron Search).
4. Edit → Make requested changes or click **Update Expire Date.**



5. Click **Save.**

8.3. Grant Reporter Permissions

All library staff requesting permissions for reports functions must complete an on-line privacy waiver. https://bc.libraries.coop/support/sitka/reporter-privacy-waiver/

Completed submissions are received as a new ticket in RT.

All Staff Permissions

1. Ticket is received in Sitka Support Queue with subject = **New All Staff Reporter Privacy Waiver Submission**
2. Log in to Evergreen using a workstation registered to the requestors home library
3. Go to **Circulation** → **Check Out**
4. Retrieve account using account barcode (or Patron Search)
5. Edit → Verify the account contains the following: First Name, Last Name, Email, Phone Number, & Address.
   a. Incomplete staff accounts will not be granted reporter permissions.
6. Click **Secondary Groups** → choose **Reporter View Output Permissions**
7. Click **Add**
8. Click **Apply Changes**
9. Click **Save**
10. Reply to Requestor
    a. Include links to reports documentation
11. Update RT ticket
    a. Add the library code to start of the ticket subject
    b. Add the account barcode to end of the ticket subject
    c. Add library tag
    d. Set status to Resolved
    e. Set resolution to Fixed

Full Reporter Permissions

1. Ticket is received in Sitka Support Queue with subject = **New Full Reporter Privacy Waiver Submission**
2. Log in to Evergreen using a workstation registered to the requestors home library
3. Go to **Circulation** → **Check Out**
4. Retrieve account using account barcode (or Patron Search)
5. Edit → Verify the account contains the following: First Name, Last Name, Email, Phone Number, & Address.
    a. Incomplete staff accounts will not be granted reporter permissions.
6. Click **Secondary Groups** → choose **Reporter Full Permissions**
7. Click **Add**
8. Click **Apply Changes**
9. Click **Save**
10. Reply to Requestor
    a. Include links to reports documentation
11. Update RT ticket
    a. Add the library code to start of the ticket subject
    b. Add the account barcode to end of the ticket subject
    c. Add library tag
    d. Set status to Resolved
    e. Set resolution to Fixed

8.4. Closing Library Staff Accounts

When a staff account is no longer to be used (e.g. retirement), it can be closed; some information for library staff here: https://docs.libraries.coop/sitka/_closing_library_staff_accounts.html

They can update the main patron profile permission group and working location of a staff account unless an account has LSA permissions (in which case we will). If an account has reporter permissions, we need to check if the account is running any recurring reports.

Run the report "Reports Run In Specified Time Period By Specified Library" (in the Recurring? column, 1 = true 0 = false), showing at least the last ~5 weeks.

If there are no recurring reports coming from the account to be retired, it is more simple; simply remove reporter permissions.

If an account to be retired is running recurring reports, inform library staff that the owner of the reports templates should make the folder these templates are in shared, so others can clone the templates, and then once cloned the old account can have the recurring reports cancelled by deleting any from the reports folder by the report owner.

If the staff person whose account is being retired has already left, we can determine a.) whether the reports can just be cloned from the shared Sitka templates, b.) whether they need to be cloned at all.

Then, we can stop reports by contacting Tina.

8.5. Request for 3rd Party Service Integration With Sitka's Evergreen

Request for 3rd Party Authentication

1. Ticket is received in Sitka Support Queue with subject = **Response submission for survey 3rd Party Service Integration With Sitka's Evergreen with results**
2. Check the wiki to determine if this is for an approved vendor/product
    a. SIP
    b. PatronAPI
3. If not on the approved vendor list - Assign the ticket to Christine
4. If it is an approved vendor - Assign the ticket to Brian.

Note: Brian has taken over most SIP / PatronAPI account creation, but the following are the instructions to create a new SIP account.

Create a SIP-Client account

1. Log in to Evergreen using a workstation registered to the requestors home library
2. Go to **Circulation** → **Register Patron**
    a. create a user with profile "SIP Client" and barcode/username of the form sip2-shortname-service.
    b. Use a password generator to create a secure 16 digit alphanumeric password.
3. Record the account information on the wiki SIP2 User page
4. Add a comment to the ticket with a CC to Brian asking to add the new account's username and password to SIP server config.
5. The next day, send the connection info to the library.
    a. The hostname, server port & username can be sent as a reply to the RT ticket.
    b. The password should be sent in a separate email with no context

8.6. Evergreen Self Check

Create an Evergreen Self Check account

1. Log in to Evergreen using a workstation registered to the requestors home library
2. Go to **Circulation** → **Register Patron**
    a. create a user with profile "Self Check Login" and barcode/username of the form shortnameselfcheck.

b. Use a password generator to create a secure 16 digit alphanumeric password.

3. Record the account information on the wiki https://wiki.libraries.coop/doku.php?id=sitka:support:self_check

Chapter 9. Action Triggers

Patron Notifications

Action Trigger info from Wiki

Action Trigger templates are used in various system processes.

Action Triggers are used for

- Some Print functions
- Automatically set overdue items to Lost
- Patron Email Notifications

Some templates are set at the Sitka level and cannot be customized. Most templates are customizable per library.

Can't customize

- Print Call number
- Print PO

Can customize

- Courtesy Notifications
- Overdue Notifications
- Lost Notifications
- Circulation Notifications
- Hold Notifications
- Patron Account Notifications

9.1. Edit Action Trigger Templates

Edit existing templates

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers.**
2. Filter to find the template that needs to be updated.
3. Select the template and click **Actions** → **Edit Selected.**
4. Modify the template as needed.
5. Click **Save.**

9.2. Clone Action Trigger Templates

Clone existing templates

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers.**
2. Filter to find an existing template to copy

3. Select the template and click **Actions** → **Clone Selected.**
4. An alert will appear **Clone event definition environment as well?** → Click **Confirm**
5. Enter **Owning Library.**
6. Add the library short code to the **Name** field.
7. Modify the template as needed.
8. Click **Save**

9.3. Other info

Events that use opt_in_setting: *circ.default_overdue_notices_enabled*

- New/expiring accounts
- Predue/overdue/marked lost
- New due date by emergency closing
- Fine limit exceeded.

They use the following hooks:

- *autorenewal*,
- *checkout.due*,
- *checkout.due.emergency_closing*,
- *lost*,
- *lost.auto*,
- *lost.found*,
- *penalty.PATRON_EXCEEDS_FINES*
- au.created,
- au.expired

NOTE Emailing checkout receipt uses opt_in_setting: *circ.send_email_checkout_receipts*

NOTE Events related to holds (including expiring holdshelf), booking reservation, checkin with missing pieces, recall **do not** use the opt_in_setting.

NOTE Depending on the trigger, the Processing Delay will be calculated differently. For example, triggers acting on an item due date count from 23:59 on the date something is due, while user account expiry counts from 00:00 on the date of account expiry.

9.4. Auto to Lost Triggers

The auto to lost trigger and associated email notification must be set up in a very specific way.

9.4.1. Setting Up the Email Notification

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers.**
2. Filter to find an existing template to copy
3. Select the template and click **Actions** → **Clone Selected.**
4. An alert will appear **Clone event definition environment as well?** → Click **Confirm**
5. Enter **Owning Library.**
6. Add the library short code to the **Name** field.
7. Set Enabled to be un-checked.
8. Modify the template as needed, make sure the days overdue is correct for what the library wants.
9. Click **Save**

9.4.2. Setting Up the Auto to Lost Trigger

Clone the Sitka Action Trigger

1. Go to **Administration** → **Local Administration** → **Notification/Action Triggers.**
2. Click **New Event Definition**.
3. Enter the following information:
   a. Owning Library: LIBRARYCODE
   b. Name: LIBRARYCODE XX Day Overdue Mark Lost
   c. Hook: checkout.due
   d. Enabled: leave un-checked
   e. Processing Delay: XX days
   f. Processing Delay Context Field: due_date
   g. Reactor: MarkItemLost
   h. Validator: CircIsOverdue
   i. Granularity: daily
   j. Max Event Validity Delay: You MUST leave this field blank
   k. Retention Interval: you MUST leave this field blank
   l. Context Bib Path: target_copy.call_number.record
   m. Context Item Path: target_copy
   n. Context Library Path: circ_lib
   o. Context User Path: usr
4. Click **Save**.

9.4.3. Turning on Auto to Lost

When auto to lost is turned on for the very first time it will run overnight and set everything that is past the overdue threshold to lost. This is contingent on there being no value set for *Max Event Validity Delay* or *Retention Interval*; if values are present not all long overdue items will be set to lost.

1. Confirm that everything is correct for both the email notification and the auto to lost trigger.
2. Check the box for Enabled in the email notification.
3. Click **Save**.
4. Check the box for Enabled in the auto to lost.
5. Click **Save**.
6. The next day, open the auto to lost trigger.
7. Enter the following information:
   a. Max Event Validity Delay: Enter a value between the Processing Delay and Processing Delay + Retention Interval
   b. Retention Interval: 3 mons
8. Click **Save**.

CAUTION	There is a bug preventing values from being removed from the *Max Event Validity Delay* or *Retention Interval* fields in the staff client. This means that inactive auto to lost triggers can't just be turned back on in the staff client; they should be referred to Tier2 Support.

9.4.4. Headers and Macros

If the template contains macros [% xxxxx -%] you must make sure to include the qualifiying information before the macros

Example: macro = [% real_short %]

You can log into your account here: https://[% real_short %].[% lib.mailing_address.state %].catalogue.libraries.coop/eg/opac/login?notice=P3D

Unresolved directive in sitka-staff.adoc - include::Tickets/known-errors.adoc[]

Chapter 10. Paper-Overdues

Evergreen can generate a PDF file of overdue notices which is then emailed to the library to be printed and distributed to patrons.

1. These notices are created and emailed daily. An email with an empty PDF file means that there are no items for that day that meet the criteria to have a paper overdue notice generated.
2. Paper overdues can be generated at the following intervals 1, 2, 3, 4, 5, 6, 7, 8, 9 or 10 weeks after the item becomes due.
   a. The intervals define when a second, third, or fourth, and so on, letter is sent out.
   b. Paper overdues at 1 and 2 weeks overdue are generated for only for patrons without email addresses in their account. From the 3 weeks onwards the notices are generated for all applicable patrons.
   c. The final paper overdue notice, at the library's chosen interval, can be set up as a billing notice and can include the item replacement cost and applicable processing fees. The replacement cost comes from the Price item attribute; if this attribute is blank the value set for the library setting Default Item Price is used instead. The processing fee uses the value from the library setting Lost Materials Processing Fee.

10.1. Troubleshooting

A copy of all emails sent is sent to paper-overdue@sitka.bclibraries.ca

URL - https://webmail.libraries.coop/horde/login.php password for that email account is at: https://vaultwarden.libraries.coop

If a library needs a notice resent to them

1. Ask the library to check their spam
2. Verify the email address they expect the notice to be sent to
3. Log in to paper-overdue@sitka.bclibraries.ca if you can forward the existing email do so.
4. If no notices were created for the day = escalate ticket

More info can be found here : https://wiki.libraries.coop/doku.php?id=sitka:support:paper_overdue

If a library requests changes to the notice template

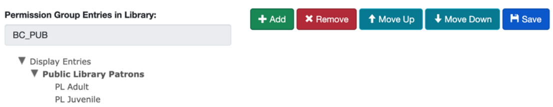
1. Assign ticket to Tina or Mark

Chapter 11. Permission Tree display

Libraries can request for us to customize the displayed list of permission groups for easier patron registration. The drop-down menu for Main (Profile) Permission Group on the Register Patron and Patron Edit screens will be customized to show only the permission groups the library currently uses.

Add New Custom Permission Tree

1. Library Sends Request
2. Run Report to verify permission groups in use (remember to include staff!!)
3. **Administration** → **Local Administration** → **Permission Tree Display Entries**
4. Permission Group Entries in Library:
5. Click **Add**
6. Add Root Entries for **Library Users** **andLibrary Staff**
   a. Choose the appropriate types based on Libray Type (Public, Post-Secondary, Special)
7. Click on root entry to add permission to, then click **Add**
   a. The current selection will be in **bold** text
   b. Click on Users dropdown and select desired user role to add, then click **Submit**



8. **Administration** → **Local Administration** → **Permission Tree Display Entries**
9. If correct org unit is not selected, select the one to be edited. (default is library you are signed in to)
10. If adding an entry:
    a. Click on root entry to add user role to, then click **Add**
    b. Click on Users dropdown and select desired role to add, then click **Submit**
11. If removing a user role, select it in the list, then click **Remove**
    a. The current selection will be in **bold** text
12. To adjust the position of a role, click on it, then click **Move Up** or **Move Down**
    a. If the role is under the incorrect root entry, delete it and add it to the correct root entry
    b. Once the role is in the correct location, click **Save**

Chapter 12. Annual Statistics for Libraries

12.1. BC Public Libraries

The current Sitka Statistics Reports for the Public Libraries Branch annual survey are found here: https://bc.libraries.coop/support/sitka/llb-reports/

Website statistics are included for LibPress libraries.

Additional information on the work can be found here: http://docs.libraries.coop/policy/_annual_reports_for_public_libraries_branch_bc.html

The preparation of these reports is funded by the BC Public Libraries Branch.

12.2. Manitoba Public Libraries

Active Patron Statistics for Spruce Public Libraries can be found here: https://bc.libraries.coop/spruce-reports/

Instructions for gathering the other statistics for the Manitoba Public Library Services Branch's annual survey can be found here: http://docs.libraries.coop/policy/_annual_reports_for_manitoba_public_library_services_branch_plsb.html

Website statistics for LibPress libraries can be found here: https://help.libraries.coop/libpress/1-the-basics/1-3-matomo-statistics/current-libpress-statistics/

12.3. All Other Libraries

Other libraries are responsible for gathering their own annual statistics.

We recommend libraries set up recurring monthly reports for statistics that they need to report on annually. Report templates for circulation statistics, collection size and make up, patron counts, and more can be found in the shared Sitka_templates: http://docs.libraries.coop/sitka/_shared_sitka_templates.html#_what_8217_s_in_sitka_templates

Tier 2 Support

Chapter 13. Circulation Policies

Circulation Policy info from Wiki

13.1. Edit Circulation policies

13.2. Add Circulation policies

Related

- Circulation Limit Sets
- Circulation Duration Rules
- Circulation Recurring Fine Rules
- Circulation Max Fine Rules
- Hard Due Dates

13.3. Auto-Renewal

Chapter 14. Hold Policies

Circulation Policy info from Wiki

14.1. Edit Hold policies

14.2. Add Hold policies

Note .Set home library to individual library and not Sitka for any library that doesn't do reciprocal borrowing

14.3. Suspend ILC Holds

Stop inbound ILC hold

1. Set Hold Hard Boundary to 3 for the request library on Library Settings Editor

Stop outbound ILC hold

- Choose one of the following based on the setup of the library's existing hold policies:
  - If the library does not apply age-based hold protection, add a hold policy with pickup_lib=BC_ILC, owning_lib=circ_lib= individual library, circ_modifier is null, holdable is false. Deactivate it to reopen outbound ILC hold.
  - If the library applies age-based hold protection on all items, remove the value in Item Age < field (example: policy id 633 with pickup_lib=BC_ILC, owning_lib=circ_lib=BTE, circ_modifier is null). Keep the value in the RT ticket. Add it back to reopen ILC outbound hold.
  - If there is an inactive hold policy blocking ILC holds from #1, activate it.

Chapter 15. Hard Due Date

Academic libraries may wish to use hard due dates to truncate due dates at the end of a semester or allow particular material to go out for an entire semester. Library staff do not have permissions to add or edit hard due date rules. See http://docs.libraries.coop/sitka/_hard_due_date.html

15.1. Update Hard Due Date

When updating an existing hard due date rule you must update the ceiling date display and add a new hard due date value

Edit Ceiling Date

1. Go to **Administration** → **Server Administration** → **Hard Due Date Changes.**
2. Select the rule you want to edit and click **Actions** → **Edit Selected.**
3. Enter the **Current Ceiling Date.**
4. Click **Save.**

Add New Hard Due Date Value

1. Click **Values**
2. Click **New Hard Due Date Values**
3. Enter the **Active Date**
4. Enter the **Ceiling Date**
5. Click **Save**

NOTE	Libraries can submit all the hard due dates for the year. Use the active/ceiling date to enter all the dates for fall, winter, and summer terms.

15.2. New Hard Due Date

To setup a new hard due date you must create the new hard due date and then link it to the applicable circulation policies.

New Hard Due Date

1. Go to **Administration** → **Server Administration** → **Hard Due Date Changes.**
2. Click **New Hard Due Date.**
3. Enter a **Name**
4. Enter the **Owner**
5. Enter the **Ceiling Date**
6. Check the box for **Always Use?** if the rule should apply all the time.
    a. Leave this unchecked if the rule only applies when the regular due date would fall after the hard due date.

7. Click **Save**

Add New Hard Due Date Value

1. Click **Values.**
2. Click **New Hard Due Date Values.**
3. Enter the **Active Date**
4. Enter the **Ceiling Date**
5. Click **Save**

Add Hard Due Date to Circulation Policies

1. Go to **Administration** → **Local Administration** → **Circulation Policies**
2. Add the Hard Due Date rule to the policies it should apply to
3. See http://asciidoc.libraries.coop/sitka-style-master/html/_circulation_policies.html#_edit_circulation_policies

Chapter 16. Emergency Closing Procedures

1. Enter Emergency Closing
2. Disable holds (ILC & local)
3. OPAC banner
4. Website banner
5. Renew expiring patrons

Creating Support Resources

Chapter 17. Style guide

17.1. Creating Support Resources

Visual Identity

AsciiDoc Style Guide

Consistent Wording

Public Catalogue

Chapter 18. Bootstrap Settings

These are all from the individual opac_config.yml skin library records.

Settings

- If you want the text in the header section to be black add the line below to the config section.
  - header_has_light_background: true
  - see BVIC for example
- If you want the text in the footer section to be black add the line below to the config section.
  - footer_has_light_background: true
  - see BTA for example
- The facet colour is controlled by the facets_back setting in the colors: section.
- The header colour is controlled by the header_primary setting in the colors: section.
- The header fade colour is controlled by the header_primary_fade setting in the colors: section.
- The footer colour is controlled by the footer_primary setting in the colors: section.
- The footer fade colour is controlled by the footer_primary_fade setting in the colors: section.
- Lots of button type settings are controlled by the button_confirm setting in the colors: section.
  - example, My Account login button, Submit button, Search Filters bars, Back To Results button

NOTE The extra bib detail horizontal bars are still controlled by the extras_bar_bg setting in the colors: section.

NOTE The Search button is still controlled by the button_bg setting in the colors: section.

NOTE A lot of the other changes, like bolding the footer and header text are system wide and exist in the style.css.tt2 record in /srv/openils/var/templates-bootstrap/opac/css

Unplanned Downtime

Chapter 19. Unplanned Downtime

https://wiki.libraries.coop/doku.php?id=cooperative:communications:emergency

In case of single or multiple service outage lasting longer than 15 minutes

1. Notify all staff in Teams & IRC
2. Create a primary ticket in RT
3. Create a ticket for any calls received
4. Link all related tickets to primary ticket
5. Draft a comm to post in Sitka group / Update Splash Page / Update Support Service page
6. Appoint someone to post updates regularly (every 30 minutes if serious outage).
7. Post an all-clear to any communications channels employed. All-clear must be proclaimed by one of: Scott, Sharon, Tami, Kevin M.
8. Record Unplanned downtime here - https://wiki.libraries.coop/doku.php?id=sitka:unscheduled_downtime

Testing

Chapter 20. Testing Guidelines

It is important to follow Sitka's testing guidelines to ensure testing is consistent and issues are reported to RT and Launchpad in a timely manner.

20.1. Test Server Info

Sitka test servers: https://wiki.libraries.coop/doku.php?id=sitka:testing_server_info (login required)

Evergreen Community test servers: https://wiki.evergreen-ils.org/doku.php?id=community_servers

20.2. Support Issues Testing

The following steps should be followed when testing issues reported by libraries:

1. Ensure you have all the relevant information from the library.
2. Attempt to replicate the issue on Sitka's testing server.
    a. Make sure to use the same or equivalent accounts, records, items, etc.
    b. Do not use your Sitka Staff account for testing.
    c. Make sure to use a test server running the same version of Evergreen as production.
3. Detail your testing as a comment in the RT ticket. Include the steps you took, the barcodes etc. you used, and the results you got.
4. Search Launchpad to see if a bug already exists for the reported issue. If a bug report doesn't exist yet further testing is needed.
    a. If you find an existing bug click **This bug affects X people. Does this bug affect you?** to indicate that we are affected by the bug. If not already in the bug, add a comment to indicate that it affects the version of Evergreen you tested.
    b. Add the Launchpad bug number to the RT ticket and let the library know it's a known issue.
5. When available test the issue on a Sitka test server running a newer version of Evergreen (this will generally be available in the lead up to the annual upgrade).
6. Test the issue on an Evergreen community test server running the same or newer version of Evergreen.
7. If the issue can be replicated on an Evergreen community test server report the issue to Launchpad.
8. Follow the procedure to move the ticket into the Sitka Bugs queue.

NOTE	If you are unable to replicate the issue on a Sitka test server escalate the ticket to the Support Operations Lead.

20.3. Upgrade Testing

Extensive testing is done ahead of Sitka's annual upgrade.

1. Use the testing checklist for the upgrade as a guide.
    a. This include a list of the new and existing features and functionalities that need to be tested.
2. Test on the upgrade server and compare the behaviour with current documentation and the production server.
3. Record the results of your testing in the checklist.

When an issue is identified:

1. Create an RT ticket in the Testing queue.
2. Link the RT ticket to the parent ticket for the upgrade.
3. Report only one issue on a ticket.
4. Add the "3.x Upgrade" tag and any relevant EG-tags
5. Include the steps to take to replicate the issue.
    a. Be as specific as possible describing your issue:
    b. What were you doing? What did you expect to happen? What actually happened? How does it differ from the current behaviour on the production server?
6. Include screenshots.
7. Attempt to replicate the issue on a Sitka upstream server or an Evergreen community test server running the same version of Evergreen.
    a. If it can be replicated it’s an upstream bug and needs to be reported to Launchpad.

20.4. Launchpad

20.4.1. Reporting a Bug

Bugs discovered in Sitka’s Evergreen and confirmed on a Evergreen community test server should be reported to Launchpad, the Evergreen community’s bug reporting tool. Once the bug is reported relevant RT tickets should be updated to include the Launchpad bug number.

When reporting a bug include as much information as you can:

- the version(s) of Evergreen you have tested.
- the browser and version you are using.
- the steps to replicate the issue (in a numbered list).
- what happened.
- what you expected to happen.

Make sure to include relevant screenshots and offical Evergreen tags.

CAUTION Screenshots should always be taken using an Evergreen community server. In rare circumstances Sitka’s training server can be used. NEVER post a screenshot to Launchpad taken on a Sitka server that uses production data.

20.4.2. Confirming and Updating Bugs

Sitka staff can mark bugs as affecting them, mark bugs as confirmed, and add additional information about a bug as a comment. Staff can also sign off on bugs that have been tested, usually during Bug Squashing and Feedback Fest weeks.

Some Sitka staff are Evergreen Bug Wranglers and can edit the importance of a bug.

More information about the Evergreen community's use of Launchpad can be found on their Evergreen Bug Wranger FAQ.