

To: eiNetwork Steering Committee
From: Sharon McRae, representing the Evergreen Circulation Taskforce
May 25, 2011
Report 1

All members of the Evergreen Circulation taskforce attended the initial training and kickoff on Wednesday, May 4 at the East Liberty Library. eiNetwork staff provided an overview of the Evergreen process and walked the taskforce through the basic circulation functions.

After the initial training, taskforce members worked individually on the following tasks until the second meeting on Tuesday, May 24:

1. Explored the wiki.
2. Installed the Evergreen client.
3. Reviewed the materials on the wiki, including participating library "how to" manuals.
4. Created barcodes or utilize barcodes within the test database.
5. Added circulation function scenario pages to the wiki.
6. Members began crafting scenarios, questions and issues for posting to the wiki.

On Tuesday, May 24, several members met to discuss the following:

1. Overall impressions of the software.
2. Likes and dislikes at this initial stage of the process.

Members agreed that further functions need to be set up within the test database. For example, the need to be able to run the pull list, follow the hold process and review receipt printing. There is some uncertainty as to the limitations of the test database.

Members discussed the functionality report submitted by Janet Forton. She worked from the III system rather than hunting/pecking in the test database. Based upon her work and the work of a taskforce member from USC, the group decided to divide up the circulation functions based upon the III manual on the eiN member page.

Members split up the circulation functions. Two members each will work on check-in/checkout, holds, patron records/registration, bills/fines. Members agreed to hold off on the holds matrix, pull list/view/clear hold shelf and notifications due to the limitations of the test database at this time. Some discussion of the circulation matrix/holds led to the decision to refer policy issues to the Steering Committee or LAC.

Members agreed to meet every two weeks and noted that Mt. Lebanon, Wilkinsburg and Northland will be likely sites. The taskforce is a very hardworking, knowledgeable and positive group.

Respectfully submitted,
Sharon McRae, Shaler