

Reports Committee Agenda
2:00 p.m. December 10, 2020

1. Welcome (In attendance, Kyle Constant, Kate Coleman, Rebecca Payne, Lori Mangan, Steve Erichsen, Josh Lamb)
2. Questions and concerns
 - a. Some discussion ensued about the future of the committee and whether the work being undertaken at this time is needed. There was general agreement that, though important, the current work on guides was easy to push to a back burner. All committee members wanted to continue on the project.
 - b. In the same vein, the committee discussed the current format of the meetings, namely that every other month is currently slated to be a working meeting while the alternating months are more formal, “business” meetings. Everyone agreed to keep the format as is.
3. Unfinished Business
 - a. Training Materials
 - i. Videos
 1. Kyle Constant reported that he had submitted a couple more videos to Ron Eifert (Sikeston) and Dan Brower (Cass County) to put on the Missouri Evergreen website. He has a few more that he’d like to create. He also said that he had spoken with Shannon Midyett (Poplar Bluff) about getting a YouTube channel made for the training videos and she was in the process of creating one. More information to come.
 - ii. Report Guides
 1. Kyle Constant reported that he had made some progress on a few of his guides and would be submitting them for inclusion on the website soon. Kate Coleman said she’d worked on her guides but they weren’t yet ready for submission. Josh Lamb said he’d be happy to work on more guides as he’d completed the ones assigned so far.
 - iii. General Guides
 1. Kyle Constant said he’d submitted a couple of general guides for posting to the Missouri Evergreen website but that they weren’t up yet. He asked if anyone else had ideas for general guides for Reports but other than Excel tutorials, no one had any ideas.
 - b. Report Usage report
 - i. Kyle Constant gave a report on the template Equinox was attempting to create to track the usage of shared templates in the ME-Reports folders. Multiple attempts were made to create the report but each time they had a different problem. Kyle was continuing to work with Rogan Hamby of Equinox to sort out the

issues. Eventually, the report should be usable by the committee to evaluate the use and popularity of shared templates.

4. New Business

a. Output Retention Limit

- i. Kyle Constant explained that Equinox was asking Missouri Evergreen to place a limit on the amount of time that output files were to be kept on their servers. Rebecca Payne was concerned that keeping reports for less than a year would present problems for member libraries running annual reports and completing the Public Library Survey. Kyle suggested that libraries could always run the reports again or be advised about how to save their output files for later use. Steve Erichsen said that 180 days was enough time to satisfy Cass County's reporting requirements and Kate Coleman agreed, referencing Jefferson County's reporting. The committee agreed upon setting a 180 day limit on the storage of output files on Equinox's servers.

b. Shared Drive

- i. Kyle explained that Shannon Midyett had successfully set up GSuite access for Missouri Evergreen and had created a Shared Drive for each of the committees. She gave Kyle access but didn't have his permissions set properly so that Kyle could add other members. He will continue to work on it and get access set up so that all the materials could be moved.

c. Migration

- i. 12/10/20 - Bowling Green
 1. Kyle briefly mentioned that Bowling Green was migrating today and that the library's Director had opted to be contacted later regarding reports training. He will follow up.

d. Evergreen Reports Interest Group Update

- i. Kyle briefly explained an Aged Circulation issue that he was concerned might be an issue for some of the Missouri Evergreen shared templates. Steve Erichsen said he would follow up with Equinox to find out more information.

e. Curbside Report

- i. Kyle reported that he had created a curbside statistics report for use at his library. Colleen Knight had also discussed a template that Equinox had made for her for the same purpose. The committee decided to add the Equinox version of the template to the "Custom" folder in the ME-Reports shared folder and monitor its usage.

Next Meeting: January 14, 2020, 2:00 p.m. (Working Meeting)