

Reports Committee Notes
2:00 p.m. February 11, 2021

1. Welcome (Attending - Committee members: Kyle Constant (Trails), Lori Mangan (North Kansas City); Non-committee members: Diane Disbro (Scenic))
2. Questions and concerns
 - a. None
3. Unfinished Business
 - a. Training Materials
 - i. Videos
 1. Kyle Constant stated he had successfully created a YouTube playlist for the reports training videos and had sent the link to Dan Brower (Cass County) and Ron Eifert (Sikeston) for inclusion on the Missouri Evergreen website.
 - ii. Report Guides
 1. Kyle Constant stated that he was still working on his guides and knew encouraged other members to finish their guides so that they could be added to the Missouri Evergreen website.
 - b. Report Usage Report
 - i. Kyle informed the committee that Rogan Hamby from Equinox had sorted out most if not all the bugs in the previous attempts to produce this report. The committee members should now be receiving report output each month that shows how often templates are being used to run reports as well as who last ran the template. Lori Mangan confirmed that she received the latest version of this report on February 1.
4. New Business
 - a. Committee Priorities
 - i. Best Practices
 1. Kyle observed that reports currently has no best practices available for members and asked if anyone else thought they should exist. Lori suggested brief best practices could be useful. She suggested best practices on cloning and deleting old report output would both be worthwhile subjects for a best practices document. She added that a best practices document might also encourage library staff to play with reports without the fear of breaking things.
 - ii. Training for new/recent migrations - Kyle Constant stated that he felt it was imperative that the Reports Committee touch base with libraries that are scheduled to migrate or have recently migrated. This contact is crucial to avoid early frustration with Evergreen and improve the overall experience of being in the consortium.
 1. Brookfield Public Library

- a. Kyle Constant said he would be able to contact the Director of Brookfield Public Library to make sure she had her reporting needs covered.
 2. Neosho-Newton County Public Library
 - a. Kyle said he would contact Rebecca Payne to see if she could touch base with the Director at Neosho-Newton County to assess their reporting needs.
 - b. Kyle asked Diane Disbro if she had more information on NNCPL and their recent struggles post-migration. She mentioned that their Tech Services Manager had contacted Scenic and said they were struggling with some aspects of cataloging and circulation. She didn't think reports functionality was mentioned. Diane reiterated her feeling that Missouri Evergreen libraries needed to act when another member library was struggling, to which Kyle and Lori agreed.
 - c. As part of the NNCPL conversation, Lori asked if it would be possible to get a list of reports commonly used by libraries scheduled for migration so that Reports Committee members could attempt to match them with shared templates. Kyle said this was something he commonly does verbally when talking to new libraries, but it should absolutely be a formal part of the onboarding process.
 - d. Kyle also mentioned an idea about putting together a group of common templates (monthly circulation, weeding reports, inventory lists, etc.) and putting them in a "Basic Reports" folder to be used by new libraries as an introduction to the reporting tool.
 - e. Diane and Lori both spoke about different ideas surrounding running reports for new libraries. Diane thought it might give the new libraries a good example of a successfully run report. Lori thought that running the same report as a new library when they first start would give them an indication that they ran it successfully, as a point of comparison.
 3. Bowling Green Public Library
 - a. Kyle Constant said he would ask Kate Coleman if she would be willing to contact Bowling Green Public Library.
- iii. Survey for Reports Module Feedback
 1. Kyle reported that the Strategic Planning Committee had completed a recent survey that indicated member libraries were unhappy with the reports module, but didn't provide

details about their frustrations. Kyle said he would like to put together a survey to try to get more information why people were not satisfied with reports. He solicited help from the other committee members for ideas about what questions to ask and said he would send out that request to the other committee members via email.

2. Lori suggest, what are you struggling with, comfort level with Excel,

Next Meeting: March 11, 2021, 2:00 p.m. (Working Meeting)