AFTER THE UPGRADE!

Anna Goben

Indiana State Library

A Fruitful Year

- Responsive OPAC redesign
- Multiple housekeeping and maintenance projects
- Intra-Evergreen Indiana Payment Program
- Integrated online credit card payments
- Upgrade to 2.5

UP NEXT

- Online, asynchronous trainings
- Revisiting the KPAC
- Acquisitions
- Serials

ONLINE TRAININGS

EVERGREEN INDIANA

OPEN SOURCE INTEGRATED LIBRARY SYSTEM

Available Courses

Holds
Discover how to process holds and get materials for your patrons from other member libraries.

Cataloging 101
Get started copy cataloging in Evergreen Indiana. This course is the prerequisite for the Advanced Cataloging series, which is required to receive your Cat1 status. (3 TLEUs)

Using the Training Server
Find out how to set up and use the training server so that you can practice in a realistic environment without impacting the live data.

Circulation 101
An introduction to the basic functions, procedures and policies involved in circulation and patron services in Evergreen Indiana.

Reporting 101
Learn the basics of reporting in Evergreen Indiana.

Local Administration 101
Leverage the software and lead your library as a local administrator.

Welcome to the official training site for Evergreen Indiana! Don't forget to check out the Evergreen Indiana webpage, Weekly Update Blog, and Indiana State Library's Evergreen Indiana page for additional resources!

◄ March 2014 ►

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

COMPONENTS

EVERGREEN INDIANA
Open Source Integrated Library System

You are logged in as Admin Evergreen

eitrain ▶ Circ101

Topic outline

Participants

Forums
Quizzes
Resources

Search Forums

Go

Advanced search ❓

Grades
Profile

Miscellaneous
Circulation
Cataloging
Administration
Reports
All courses

📢 News forum
📢 Q&A

1   Definitions & Navigation
At the beginning, we start with the jargon. We share a lot of library terminology with other consortia and ILS, but in order to fully leverage the resources, you have to know how we communicate and what we mean! The next step is knowing where to go in the staff client and how to get there.

📄 Glossary Review
📄 EI Glossary
📄 Glossary
📄 EI Navigation

2   Evergreen Indiana Code of Ethics
Evergreen Indiana adheres to a strict code of ethics to protect the privacy of our patrons. Each staff member is responsible for reviewing the shared Code and following consortium and local procedures before accessing or disseminating any patron or circulation information. Please retain a signed copy of the Code of Ethics with your personnel information.

📄 Code of Ethics Review
📄 Code of Ethics Form

3   Patron Registration

KPAC

- Development on the KPAC completed with Evergreen version 2.4.

- Local customization and graphics required.

- Limits search by audience and provides options for pre-built searching in a child-friendly GUI.

Bibliomation's KPAC

Georgia Pines' KPAC
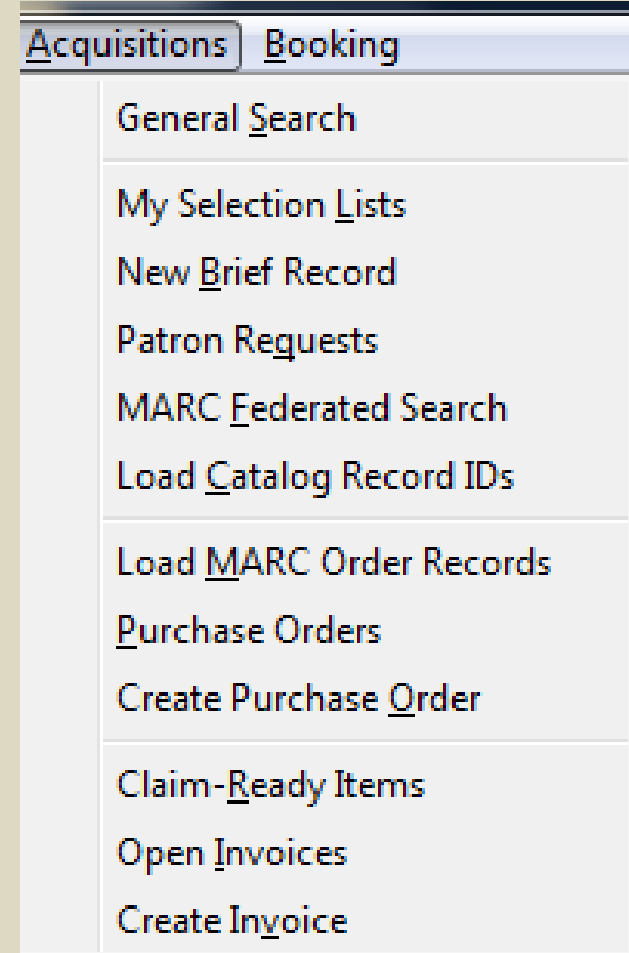
ACQUISITIONS

- BC Libraries & Bibliomation driven development

- Still growing and improving after the 2.4 major rebuild

- Wishlists and bug reports available if members wish to participated in guiding developers to most desired improvements.

Acquisitions | Booking

General Search

My Selection Lists
New Brief Record
Patron Requests
MARC Federated Search
Load Catalog Record IDs

Load MARC Order Records
Purchase Orders
Create Purchase Order

Claim-Ready Items
Open Invoices
Create Invoice

Acqui-What?

- Allows fund tracking as granularly as desired

- Build invoices, create purchase orders, and assign materials to both

- Preload vendor bib records for patrons to place holds.

- Optional: Electronically accept and confirm orders with vendors inside the staff client.

THE ACQUISITIONS PLAN

- Early summer, pilots begin creating workflows.
- Cataloging Committee works with pilots to develop procedures and policies.
- Trainings developed in late summer-early fall.
- Project opens to interested member systems in late fall.

SERIALS

- Primary development driven by Calvin College

- Still a work in progress, but has been implemented by most consortia already.

- Wishlists and bug reports available if members wish to participated in guiding developers to desired improvements.

WHAT DOES IT INCLUDE NOW?

- 2 interfaces to support preferred workflows
- Predictions
  - Includes off-cycle options
- Subscriptions
- Claiming
- Distributions

THE SERIALS PLAN

- Pilot libraries begin testing and creating workflows in early fall.

- Pilots coordinate with the Cataloging Committee to create and refine policy and procedures for dealing with serials.

- Trainings developed over the winter.

- Project opens to all members in early 2015.

JOIN US!

- Please contact me if you would like to participate in testing or piloting one of these projects.

QUESTIONS?

Anna Goben

Indiana State Library

agoben@library.in.gov

317-234-6624

www.in.gov/library/evergreen.htm