

## Evergreen Pre-Launch Update #4

August 20, 2010

To: All KCLS Staff

From: Jed Moffitt—Director of ITS

This week, I'm just going to offer some assorted snapshots of key issues that the Evergreen team is working on as we prepare to go live in essentially four weeks.

### **Catch and Release**

We will be producing two KCLS Evergreen software “releases” (the bundled entirety of the Evergreen software that we will use) before we go live the week of September 20<sup>th</sup>. We are calling the first release “Alpha 1” which will be fully defined on Monday, August 23<sup>rd</sup>. The development vendor we are working with on Alpha 1 will visit next week and review the features, functions, and any problems with performance of Alpha 1 with the KCLS Evergreen team.

Over the next two weeks we will analyze the content and performance of Alpha 1 and determine any last minute essential functionality that we are missing, identify bugs, etc. We will add these changes to a second release called Alpha 2 that will be defined by Labor Day. Alpha 2 will contain pretty much all of the Evergreen features and functions that we will go live with.

From Labor Day on, we will not be adding additional software features to Alpha 2. We will continue to patch bugs and address system performance issues.

### **So what's in Alpha 1?**

We'll tell you more next week when it is defined.

The general dilemma is this: Everyone on the KCLS Team—OPAC, CMS, Circulation, ITS, Training—everyone is doing a terrific job with preparations. The good news is that we're getting lots of new features and functions added on a daily basis. The more challenging news is that we have a limited number of key engineers in the most technically skilled positions, and they can only process so many new changes into Evergreen day-to-day.

We've been aiming high with respect to the features we want to include. We won't get all of them in under-the-wire, and we won't know exactly what makes the cut until the last minute.

So that's why I won't be able to tell you more about what's in Alpha 1 until next week.

### **Highlights**

- We made some major progress this week on the integration of Evergreen with AMH and with the PC Reservations system. These systems are all communicating with each other. We're still sorting through all of the data being passed between them.
- The developing OPAC catalog is looking great. OPAC training began this week. Our OPAC team has done a fabulous job with the look and feel of the catalog, and we are trying as hard as we can to give them all of the back-end Evergreen functionality that they need to connect to.
- I mentioned Circulation training. I was genuinely struck by how fun and intuitive and information rich the circulation staff software is. Still in my session, I found two bugs—one of which was pretty nasty—I would place a hold by searching the catalog, and the hold showed up on my record as cancelled rather than placed. Pretty fun huh? It turns out that we actually had set a parameter incorrectly in the holds configuration setup. We changed the parameter and, voila, it works correctly now. This is just an example of the kind of incidents we're encountering as we sprint for the finish. It is indeed a sobering event when you see a cancelled hold when you intended a placed hold. We're learning too.
- CMS has been great. They are working with the newest and most untested of all the Evergreen software. Last week we hung them out on a limb for several days. Every time they logged in to test, no matter where they clicked, all they saw was a self-checkout screen. The good news is that it is a really attractive self-checkout screen. 😊. They are back in business as of this writing, but we have miles to go with the CMS software (Cataloging, Acquisitions, Serials)
- The Evergreen system will require manual loading of a "staff client". The staff client is the software that goes on all the staff PCs that will be using Evergreen circulation software (Reference workstations, Circ Workstations, Back-room workstations). Ideally we would push this out to you from Service Center, but in all likelihood, this software may need ongoing patches applied, in which case we will communicate with you and your Circ Leads on procedures to load an update the staff client as we make changes to it.

I could tell you Evergreen stories all day, but I've got a call coming up with our development vendor, and just like on the old MASH episodes, there will be incoming wounded and more to do.

We'll have more information to you next week on the features and functions you can expect to see when we go live, and we'll also have a more specific timetable established for go-live week of September 20<sup>th</sup>.

All the best,

Jed