Sage Council Meeting Minutes

November 19, 2024

**Attendees**: Beth Ross (Sage), Dea Nowell (UCSLD, Chair), Jon Georg (Sage), Perry Stokes (Baker, Vice-chair), Carrie Bushman (Cook Memorial), Rachael Fox (Hood River), Delia Fields (Hermiston High School), Mary Reser (Gillam), Marsha Richmond (Lake), Chris Ostberg (Grant), Susie Hansen (Umatilla), Cori Clark (The Dalles)

**Request for agenda items**: No additional items

**Approval of September minutes** – Minor correction on page 2. Delia moved to approve the minutes with the correction. Perry seconded. Minutes approved.

**Committee Reports**

Cataloging Workgroup- The committee met on October 1st. Heather Spry was appointed as the new chair. Platform changed from GoToMeeting to Zoom as previously discussed. LoT recap, and talked about the new Sage website and Evergreen upgrade. Next meeting to be held the first Tuesday in December.

**Systems Update**Evergreen update started as scheduled. Jon had created backups beforehand on the NAS. The software upgrade itself went fairly smoothly, only taking a few hours. However, the issue that our software vendor ran into that made things problematic was that portions of the previous upgrade were left incomplete. The result was that a lot of things were therefore not functioning properly, such as Perl wasn’t properly compiling and SQL scripts were not running.

What we ultimately discovered was that roughly 60 SQL scripts were not run on the database itself at the end of the last upgrade which had to do with changes to the database tables themselves. PostgreSQL itself had to be upgraded as well as the operating system on all of the servers, which is still in progress on some of the servers.

The assumption we’re left with is that Equinox runs those SQL scripts prior to upgrade as part of their upgrade procedure, since they’d been our software vendor for over a decade.

The result is that this upgrade used up all the support hours that had been purchased as well as additional support hours. However, our expectation is that it won’t be an issue in the future. Adam, at Emerald Data Networks, is also going to help us maintain the test server since developer documentation for Evergreen is not very thorough. Our goal is that Jon and Beth will handle support of the test server with Adam’s input to reduce costs of keeping that server maintained.

Additionally, one of the complicating factors in this upgrade was that we were jumping so many versions at once, which is why we plan on being more proactive with the servers so that there will be less of a learning curve with new versions.

As far as issues staff are having, many of those issues are browser issues that can be fixed with performing a hard refresh- several council member shared how it had resolved their issues with Evergreen. Carrie reported issues with the notes field, and was going to send a screenshot to Beth. There were also issues with Libby not working, which was actively being troubleshot.

Preliminary testing of reports did not catch any errors at that time. There was a discussion about needing to train staff on reports and simple reports given how much the interface has changed.

**Streamline-**

SageLib website has been migrated, SageStaff had also been migrated to work as an intranet on the SageLib site but was not yet open for staff usage. The slideshow of libraries is now under the About Us section on SageLib. There was a suggestion to move the SageMap to the About Us section as well.

Still to do- add users for the staff intranet. The decision was to add a generic user for staff, and then specific user logins for council seat positions as needed.

**Library Elf/MessageBee-**

Library Elf is a good feature and has a lower cost than MessageBee, but it requires patrons to initiate, and we’ve found that not many patrons are signing up for it at Baker. Therefore, the concern is that low patron buy-in would continue if it was expanded to the rest of Sage.

The recommendation instead was to pursue MessageBee, as it’s more robust and more customizable than what we currently have for patron notifications.

We also had a short discussion regarding Aspen which is a customizable layer for the patron view of Evergreen, which allows for inclusion of various third party subscription materials to be included in patron search without actually adding those items to the database itself. While Aspen is open source, there is a big cost for hosting it, and we do not have an idea about how much it would cost to try and host it ourselves to reduce costs, or how many hours it would take to learn how to implement and manage it locally, or if that would even be practical.

**Financial Report-**
Perry is expecting to start compiling the budget working draft in December or January for presentation in March. Items for review were added to the agenda for January, so that the draft could be reviewed then.

Beth requested that they have a brief budget meeting in December to help get the working draft completed in advance of the January meeting. Perry, Dea, and Beth will be attending the December meeting.
 **SageLib domain-**Jon wanted to make sure the council was aware we were retaining the sagelib.org domain through GoDaddy, separate from Streamline, so that the patron notifications can still be emailed out until MessageBee is fully functional, especially since the current proposal is to focus on adding text messages first, and then look at adding email support later on. **Meeting adjourned at 10:46 am Pacific Time.**

**Next Meeting will be January 21st**