



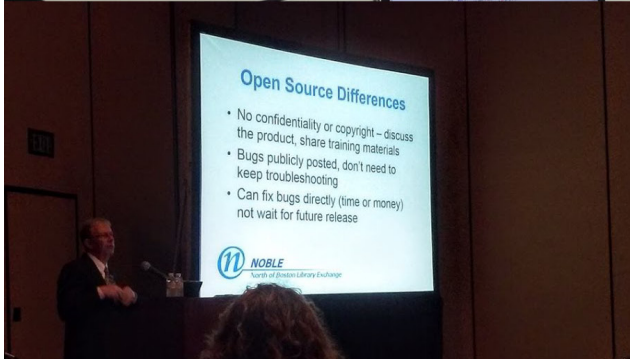
2015 Evergreen ILS

The Community Annual Report

www.evergreen-ils.org

#evergreen on freenode





ANNUAL REPORT 2015



Seeing the Forest

Since Evergreen launched in 2006 to provide an Integrated Library System for 252 public libraries in the state of Georgia, the open-source library system has grown into a robust, fully-featured system used by approximately 1,800 libraries around the world.

The 2015 activities outlined in this report demonstrate just how much the project has matured in the past nine years. More than 80 individuals have contributed to the code with many others who helped with documentation. Every year, the project sees new people helping to support Evergreen through code and documentation contributions or by providing help when it is most needed. This high level of community support provides assurance to libraries that they can rely on Evergreen and that it will continue to thrive.

Along with the increasing number of contributors, 2015 shows an ever-growing number of libraries using the software. While most of these libraries are in the United States and Canada, Evergreen is used around the world, including in the Czech Republic, India, the Netherlands, Scotland, Mexico and the Republic of Georgia.

In surveying these libraries, many praised Evergreen for helping their libraries realize goals, for improving the service provided to patrons, and for gaining control over costs. In the end, that's what all the new code, documentation, and community activities comes down to: enabling libraries to provide excellent service to their communities in a cost effective manner.

Evergreen 2.8

Released March 31st, 2015

Release Manager: Bill Erikson,
King County Library System

16 New Features including a patron message center, improved discoverability by web search engines and acquisitions improvements to reduce accidental redundant orders and purchases.

Evergreen 2.9

Released September 16th, 2015

Release Manager: Jason
Stephenson, Merrimack Valley
Library Consortium

24 New Features Including cataloging support for the web based client, blanket orders in acquisitions, increased flexibility in refunds policies configurable by libraries.

Maintenance

In addition to new feature releases we released 13 maintenance releases in 2015 which brought bug fixes and security enhancements to existing versions of Evergreen.

About Evergreen



Evergreen is used by small single libraries, large multibranch libraries, and large consortia of libraries that may or may not share materials with one another. As an open-source system, libraries may opt to install and support Evergreen on their own, use a hosted system supported by a vendor, or pursue a hybrid approach.

The Evergreen project releases two major versions per year that bring new features to libraries in addition to monthly bugfix releases. The software is entirely supported by the Evergreen community of libraries, vendors and volunteers.

Evergreen is a member of the Software Freedom Conservancy, a not-for-profit organization that provides administrative and financial services for open-source projects. The Evergreen Oversight Board is an elected board that is charged with safeguarding the community's assets and governing the interests of the larger Evergreen user and developer communities.

Evergreen is highly-scalable software for libraries that helps their users find library materials and helps the libraries acquire, manage, catalog, book, and circulate those materials to patrons no matter the size or complexity of the libraries.

A Community of Contributors

2015

36 code contributors
21 doc contributors

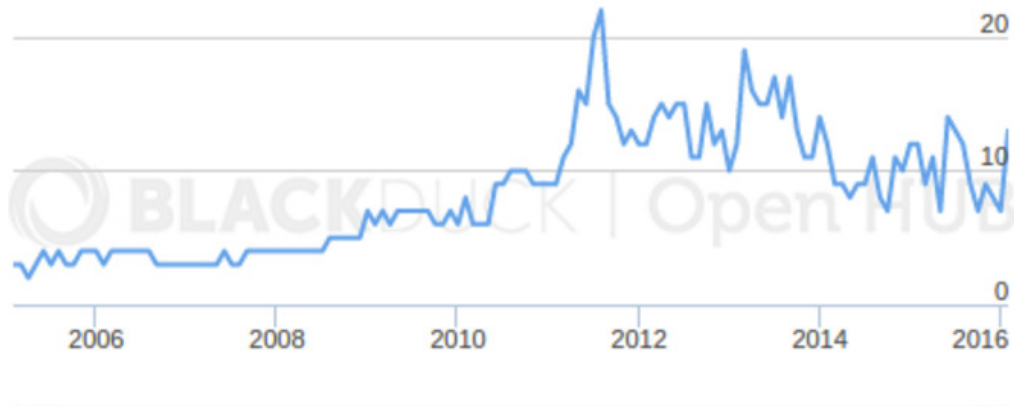
2015

860 code commits
168 doc commits

2015

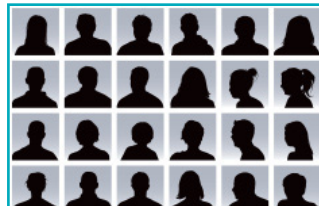
319,878 lines of
code added, 226,174
cleaned out

GROWTH OF CONTRIBUTORS SINCE 2005



Source: Black Duck Software | Open Hub <https://www.openhub.net/>
Creative Commons Attribution 3.0 Unported License.

New Contributors



Contributors are the lifeblood of our community. Whether they are working for a library, a vendor or committing their own time, software and documentation doesn't write itself.



NEW CODE CONTRIBUTORS IN 2015

Bradley Bonner, King County Library System

Jake Litrell, Massachusetts Library Network Cooperative

Christine Morgan, North of Boston Library Exchange

Stephen Moss, Catalyst Dev Works

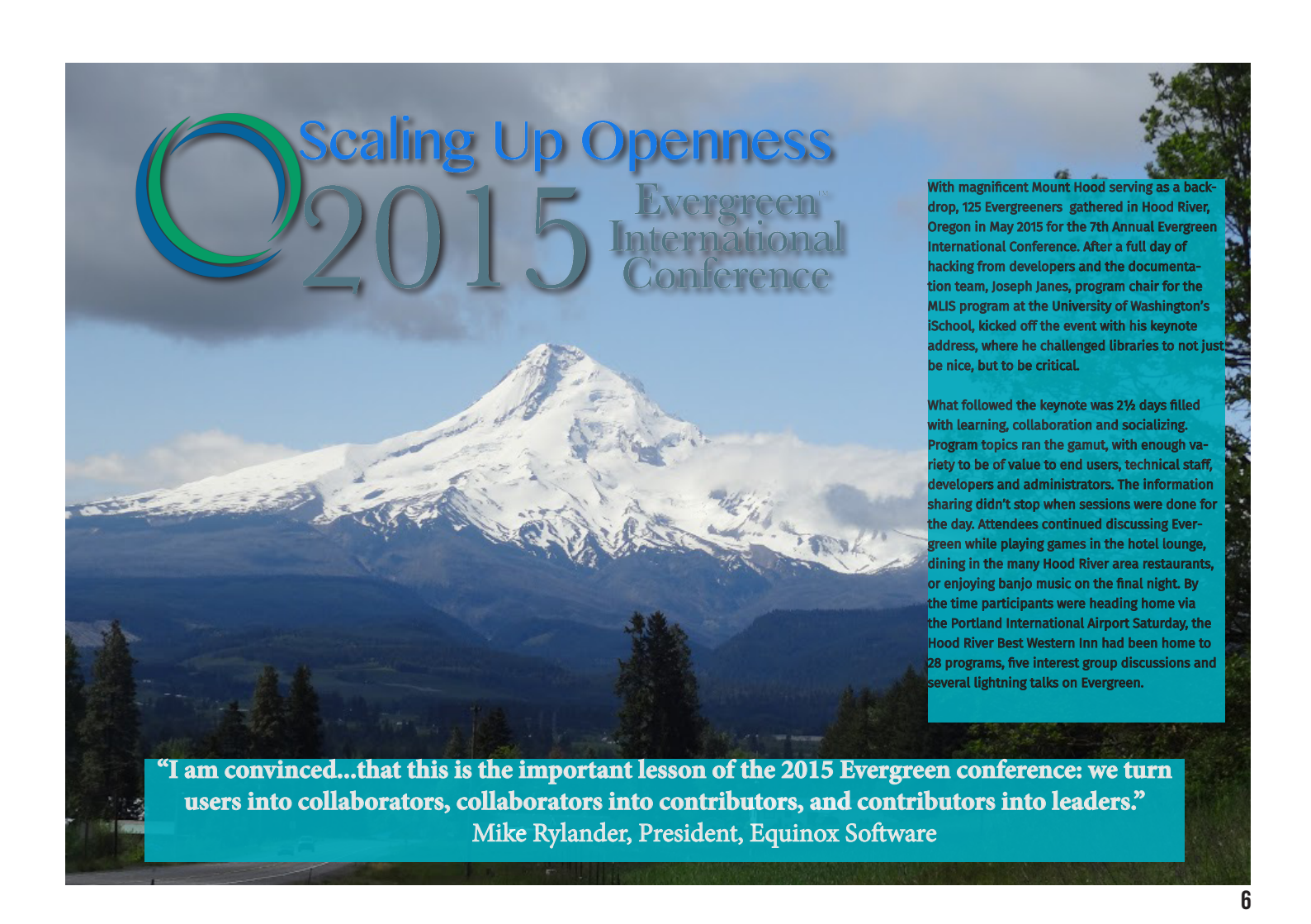
NEW DOC CONTRIBUTORS IN 2015

Matt Berowski, Lake Agassiz Regional Library

Christine Burns, British Columbia Libraries Cooperative

Debbie Luchenbill, MOBIUS

Jane Sanberg, Linn-Benton Community College

The background of the slide is a photograph of Mount Hood, a large snow-capped mountain, under a blue sky with some clouds. In the foreground, there are green evergreen trees and a grassy area.

Scaling Up Openness 2015 EvergreenSM International Conference

With magnificent Mount Hood serving as a backdrop, 125 Evergreeners gathered in Hood River, Oregon in May 2015 for the 7th Annual Evergreen International Conference. After a full day of hacking from developers and the documentation team, Joseph Janes, program chair for the MLIS program at the University of Washington's iSchool, kicked off the event with his keynote address, where he challenged libraries to not just be nice, but to be critical.

What followed the keynote was 2½ days filled with learning, collaboration and socializing. Program topics ran the gamut, with enough variety to be of value to end users, technical staff, developers and administrators. The information sharing didn't stop when sessions were done for the day. Attendees continued discussing Evergreen while playing games in the hotel lounge, dining in the many Hood River area restaurants, or enjoying banjo music on the final night. By the time participants were heading home via the Portland International Airport Saturday, the Hood River Best Western Inn had been home to 28 programs, five interest group discussions and several lightning talks on Evergreen.

"I am convinced...that this is the important lesson of the 2015 Evergreen conference: we turn users into collaborators, collaborators into contributors, and contributors into leaders."

Mike Rylander, President, Equinox Software

2015 Developer Hack-A-Way



Every year the developers of Evergreen gather at an event that travels around the country called the Hack-A-Way. It's their opportunity to sit in the same room and work out the major issues that face Evergreen's development over the next year.

Twenty code contributors gathered at the headquarters of the North of Boston Library Exchange (NOBLE) in November for the annual meetup that allows developers to continue the momentum they develop at the annual conference. During the 2015 hack-a-way, topics included the new web-based client, work on an Android app for Evergreen, future directions for search, and growing contributors in the Evergreen community.

Did you know?

20 new code contributions were merged to Evergreen during the 2015 hack-a-way.

In fact the Hack-A-Way is only one way that the Evergreen community mobilizes itself. Here are a few of the others.

Community Bug Squashing Days March 2, June 10, December 10

- 15 new bug fixes submitted for review
- 55 proposed bug fixes tested / reviewed
- 25 bug fixes merged to Evergreen

Documentation Hackfests March 6 & September 10

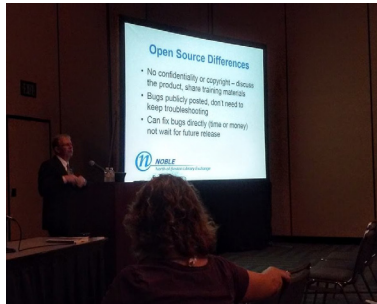
- 15 contributions documenting new Evergreen features

Test Writing Day August 14

- 2 new Quality Assurance tests written

These developers were hard at work on 2.10. As this report is being compiled we are onward and forward to 2.11!

Evergreen at ALA



The American Library Association Conference in San Francisco had a lot going for it - aside from everything you would expect from ALA it also had great food, a fun pride parade and some good opportunities to learn about a few things from some Evergreeners.

The Evergreen community sponsored its first-ever exhibit hall booth at the American Library Association Annual Conference in San Francisco last June. Community volunteers staffed the booth throughout the four-day conference, demonstrating the software to others in the library community, telling people about the open-source community, and talking to existing Evergreen users about how to get the most out of the community.

The booth was supported through donations and through the expenditure of community funds.

Ron Gagnon, Executive Director of the North of Boston Library Exchange, was one of three panelists on the Open-source: View from the Top panel, where he described the benefits his consortium has seen from using open-source software.

Grace Dunbar, Vice President of Equinox Software, Inc., participated on the LITA Top Tech Trends panel where she identified growth of open-source software and the use of open-access APIs as her two trends.

Evergreen International



60 new locations using Evergreen



Nearly 1,800 locations using Evergreen



Over 50,000,000 service population

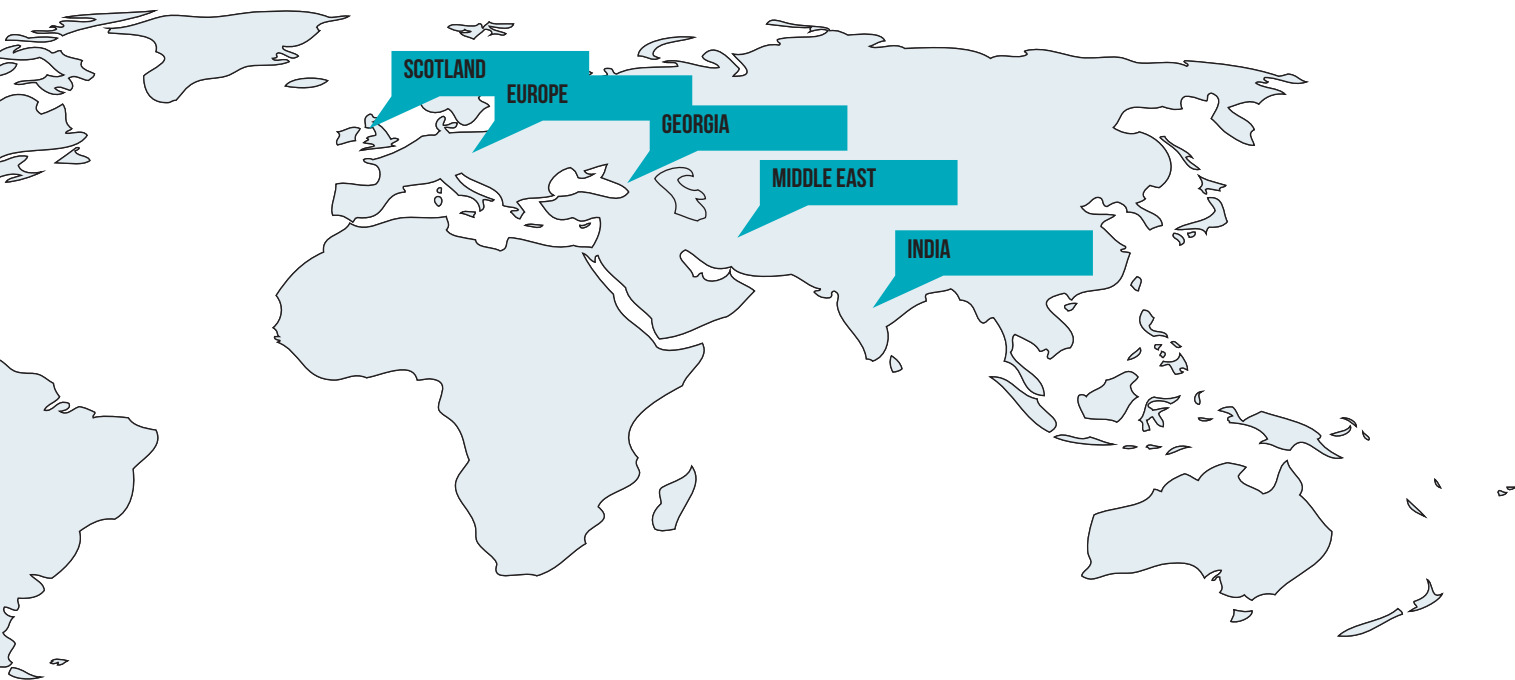
In 2016 we did our first annual community survey. That information was used to supply a lot of the information used here. Since Evergreen can be downloaded and used without any central registry it's impossible to know everyone using it and everywhere it is used. Therefore we know that these numbers are conservative and don't reflect the true size of the user base.

North America

North America continues to have the largest base of Evergreen installs with a large number of consortiums in the United States and Canada as well as installations in Mexico.

Scotland

Scotland is home to a public library consortium and we hope to see a lot more growth of Evergreen through the United Kingdom.



Europe

The Czech Republic is home to multiple Evergreen installations who have been active community members and translators of Evergreen. Additionally, the International Institute of Social History in the Netherlands uses Evergreen.

India

The Indian Institute of Science Education and Research uses Evergreen. As one of the fastest growing populations in the world we're thrilled to see Evergreen growing there as well.

Middle East

Although we don't know of any Evergreen Installations in the Middle East yet we have seen several papers come out from the region recommending the move to open-source ILSes.

Republic of Georgia

An academic consortium of Evergreen libraries is active in Tbilisi and includes their own in house developers.

SPOK, the Czech Evergreen Common Catalog

Photos are of the Jabok Library and many thanks to the library for letting us profile them in this annual report.

BY EVA CERNIAKOVA,
LINDA JANSOVA AND VACLAV JANSÁ



SPOK is a Czech acronym standing for Common Catalog (SPOlecný Katalog). It went live on September 10th, 2015. So far it is probably one of the smallest of Evergreen common catalogs (or consortia in Evergreen parlance). SPOK currently involves two libraries – Jabok Library (<http://knihovna.jabok.cuni.cz/>, in Czech only) and the Catholic Youth Hostel Library (<http://kds.op.cz/knihovna>, in Czech only).

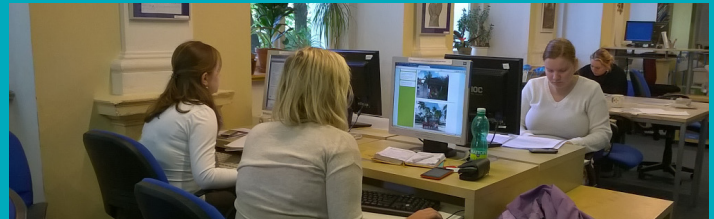
SPOK provides access to about 30 thousand holdings. Over 85 percent of them belong to Jabok Library and the rest of them are housed in the Catholic Youth Hostel Library. Jabok Library holdings focus on areas such as social work, pedagogy, psychology, ethics or theology. The Catholic Youth Hostel Library holdings cover mostly general topics and – unlike Jabok Library – about 70 percent fiction.

The two libraries have about seven hundred patrons. About 90 percent of them are Jabok Library patrons and the remaining 10 percent are the Catholic Youth Hostel Library patrons.

Jabok Library has 2.5 FTE and all of its employees are professional librarians, the Catholic Youth Hostel Library has currently 0.33 FTE and no professional librarian.

From a legal point of view, SPOK libraries are independent entities whose collaboration is contract-based. Furthermore, either of the libraries does not exist on its own. Jabok Library is an organizational unit of Jabok or the Academy of Social Pedagogy and Theology which has been established by Salesians. The Catholic Youth Hostel Library is an integral part of the Catholic Youth Hostel which is run by Dominican sisters.

Jabok Library has used Evergreen since 2011 (by the way, it went live on September 5th when Evergreen itself turned five). Back then Evergreen replaced the outdated ILS which would have been too costly to upgrade and – more importantly – would not permit the library to be actively involved in the ILS development. The decision to switch to an open-source ILS was not a particularly easy one as the library was the very first one in the country to do so. Yet the time that has elapsed since Evergreen implementation in Jabok Library has shown that the decision taken was the right one. It has also shown a path for other libraries who started considering open-source ILS as a viable option for them. Later on, some started using Evergreen and some opted for Koha.





The Catholic Youth Hostel Library was not automated prior to joining SPOK in 2015. Automation was difficult to achieve with limited funds. In 2014 the Catholic Youth Hostel got in touch with Jabok Library and attended our annual Evergreen seminar. They were so impressed by Evergreen that they soon made up their mind for Evergreen. As a result, Jabok Library submitted a grant proposal seeking funding for the creation of SPOK. In early 2015 the grant was awarded. On September 10th, 2015, SPOK went live. Since then it is available at <http://spok.jabok.cuni.cz/eg/opac/home>. Jabok Library employees and the Catholic Youth Hostel Library employees regularly communicate, in person, with e-mails and phone calls or the Czech Evergreen DokuWiki, and make decisions necessary for the operation of SPOK.

Experience gained from the creation of SPOK was shared with fellow librarians in the Czech Republic who attended the Today's Libraries conference held in September 2015 and – in more detail – at the annual Evergreen seminar held in October that year.

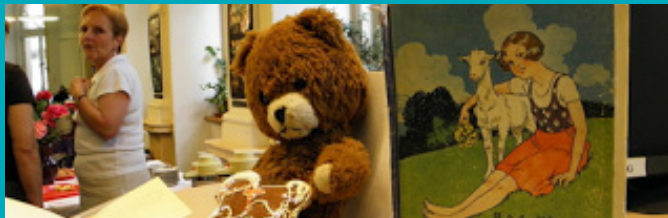
If asked for the best feature of Evergreen, we would say it being open-source and enabled for consortial operations and so serving as a natural enabler of interlibrary collaboration. Our biggest challenge is trying to correctly translate not only words from localization files but also to “translate” Evergreen’s various features to our national library conventions and vice versa.



We try to be as active members in the international Evergreen community as possible. We try to keep the Czech translations as current and accurate as possible, report bugs when we come across them and help out fellow Evergreeners. We also appreciate help provided by other members of the community. Various community-created resources (especially manuals) often serve as an inspiration for us. There are two notable examples which we have chosen to use as an illustration – Socks for Fines week and inventory procedures.

Jabok helps organize the Prague Outdoors Night, a campaign to draw attention to the cause of the homeless. Evergreen documentation mentions food for fines initiatives. When two and two were put together, the Socks for Fines week was born. Jabok Library patrons who would otherwise have to pay their fines in cash could opt for bringing warm socks instead. These socks were then given to the homeless people as part of the Prague Outdoors Night campaign.

Once in a while it is necessary to determine whether all holdings are still in the library. For this purpose we have successfully used most hints from the description of inventory procedures in Sitka's training manual.



To conclude, Evergreen is an ILS we are extremely satisfied with. It enables us to automate without any limitations which are so common for the commercial (closed source) ILSes where more features or modules equals more money to pay. We also hope that over time we shall become a bit more involved in the Evergreen international community. In 2016 we plan to contribute code for the first time. It shall be an added-content module making book covers and other content from Czech provider obalkyknih.cz visible in Evergreen online catalog.

The Web Based Staff Client

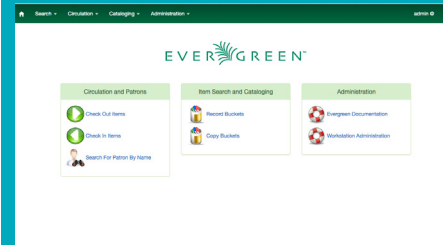
BY GRACE DUNBAR, EQUINOX SOFTWARE

The screenshot shows the Evergreen web staff client interface. At the top, there is a navigation bar with tabs for Search, Circulation, Cataloging, and Administration. The user is logged in as 'admin'. The main content area displays the profile of 'Smith, Annette Aurelia'. On the left, there is a sidebar with various tabs: Profile, Resident, Home, Library, Net Access, Unfiltered, Date of Birth, Last Activity, Last Updated, Create Date, Expire Date, Fines Owed, Items Out, Overdue, Long Overdue, Claimed, Returned, Lost, Non-Cataloged, Holds, Card, Username, and Day Phone. The 'Profile' tab is selected, showing details such as 'Resident: APEX', 'Net Access: Unfiltered', 'Date of Birth: 8/5/13', 'Last Activity: 3/25/16', 'Last Updated: 3/18/11', 'Create Date: 10/7/17', 'Expire Date: 10/7/17', 'Fines Owed: \$6.00', 'Items Out: 0', 'Overdue: 0', 'Long Overdue: 0', 'Claimed: 2', 'Returned: 0', 'Lost: 0', 'Non-Cataloged: 0', 'Holds: 2 / 0', 'Card: 148621', 'Username: 148621', and 'Day Phone: 123-853-7939'. The main area shows a 'Check Out' button, a 'Barcode' input field, a 'Submit' button, and a 'Specific Due Date' field set to '04/16/2016'. Below this, there is a table with columns: #, Alert Msg, Bill #, Due Date, Barcode, Location, Family Name, Title, Remaining Call Number, and Balance. The table is currently empty, showing 'No Items To Display'. At the bottom, there are buttons for 'Strict Barcode', 'Print Receipt', and 'Done'.

In 2015 work began in earnest on the development to re-deploy the Evergreen staff client as a web accessible application. The underlying WebSocket work was completed which will allow long-lived connections, reduce network data message size, and reduces the overall amount of messages required for API calls by leveraging streaming API responses. The WebSocket work, while not visible to the user, is a critical infrastructure component to the re-write which will ensure the new Evergreen web client is more responsive than ever.

We are particularly proud of the way that members of the community worked together with Equinox, who is performing the development work, to improve the workflow of the software in many areas. It truly was a community effort.

Work in 2016 will focus on reporting, administration, serials, and acquisitions with the hope that the first version of the full web client will be available for the Spring 2017 timed Evergreen release.



The development for the two most complex and heavily used areas of the software has been completed and tested. As the first area to be re-written in the AngularJS framework, the Circulation module underwent rigorous testing and bug fixing in 2015.

The Cataloging module was also completely re-written and tested last year. All in all, in 2015 a total of 316 separate commits for the web staff client were committed to the master code base.

More information on both of these can be found at the Evergreen community WIKI at http://wiki.evergreen-ils.org/doku.php?id=dev:browser_staff:dev_sprints:1 and http://wiki.evergreen-ils.org/doku.php?id=dev:browser_staff:dev_sprints:2

Many thanks to the following individuals who helped create the Evergreen 2015 Annual Report

GRACE DUNBAR, EQUINOX SOFTWARE
RUTH FRASUR, HAGERSTOWN - JEFFERSON
TOWNSHIP LIBRARY
RON GAGNON, NOBLE
ROGAN HAMBY, EQUINOX SOFTWARE

KATHY LUSSIER, MASSLNC
CHRISTINE MORGAN, NOBLE
AMY TERLAGA, BIBLIOMATION
EVA CERNINAKOVA, LINDA JANSOVA AND
VACLAV JANSÁ, SPOLEČNÝ KATALOG



We would also like to recognize those who served on the Evergreen Oversight Board in 2015

GRACE DUNBAR, EQUINOX SOFTWARE
RUTH FRASUR, HAGERSTOWN - JEFFERSON
TOWNSHIP LIBRARY
AMY TERLAGA, BIBLIOMATION
YAMIL SUAREZ, BERKELEE COLLEGE OF
MUSIC
TIM SPINDLER, C/W MARS
BEN HYMAN, BRITISH COLUMBIA LIBRARIES
COOPERATIVE
ROGAN HAMBY, EQUINOX SOFTWARE

ANDREA BUNTZ NEIMAN, KENT COUNTY
PUBLIC LIBRARY
CHRIS SHARP, GEORGIA PUBLIC LIBRARY
SERVICE
CHAUNCEY MONTGOMERY, SUNBURY COM-
MUNITY LIBRARY
SHARON HERBERT, BRITISH COLUMBIA
LIBRARIES COOPERATIVE
KATHY LUSSIER, MASSLNC
BEN SHUM, BIBLIOMATION



ALL CLIPART USED IN PRODUCING
THE ANNUAL REPORT IS IN THE
PUBLIC DOMAIN.

CREDITS FOR PHOTOS USED:

ROGAN HAMBY,
2014 HACK-A-WAY, PG. 1
KATHY LUSSIER, ALA, PG. 1 AND PG. 8;
2015 HACK-A-WAY, P. 7
BUZZY NIELSEN, DINNER AT 2015
CONFERENCE, PG. 1
BEN SHUM, PENGUIN AT 2015
CONFERENCE, PG. 1
TIM SPINDLER, 2014 CONFERENCE, PG. 1
ELIZABETH THOMSEN,
MOUNT HOOD, PG. 6
JABOK LIBRARY PHOTOS PROVIDED BY
STAFF AT SPOK



"Evergreen has allowed us to provide improved service while controlling costs and given our libraries a voice in development, while knowing no vendor can terminate our use of the software."

- Ron Gagnon, NOBLE

"The Evergreen ILS continues to serve as a significant tool in realizing our goals of improving resource sharing, reducing subscription costs, and building communities for Indiana libraries."

**- Anna Goben,
Evergreen Indiana**

"Prospective members continue to be surprised at the functionality Evergreen offers."

- Scott Thomas, PAILS