2017

EVERGREEN™

The Community Annual Report

ANNUAL REPORT 2017

"I'm not a cataloger, but I know enough MARC to be fun at parties."

irc.freenode.net/evergreen
@EvergreenILS
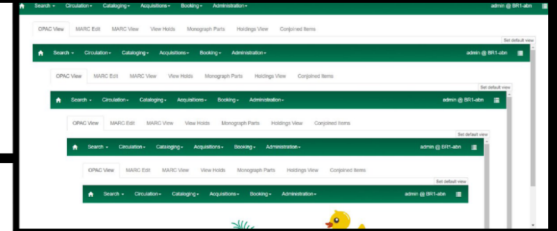
EVERGREEN

Reviewing 2017

Innovation is the word that sums up the Evergreen project in 2017. The move from the XUL client to the web client was completed with the release of Evergreen 3.0. This was completed with contributions from across the community. Developers and end-users alike from a variety of libraries and organizations made this possible. This illustrates how open source and the Evergreen community move forward harnessing the power of an active and large user base.

The community also began a review of its relationship with the Software Freedom Conservancy. This relationship has been a benefit to the project allowing the project to grow and move forward. Because of this, the project has outgrown to some extent the Conservancy's ability to support the endeavors of the project. An evaluation of options was completed with a recommendation to look for alternatives to membership in the Conservancy and its ability to support the project. The Evergreen Oversight Board approved the recommendation to move to MOBIUS to support the Evergreen Project. The process to move the Evergreen project will occur in 2018.

2017 finished with many successes in the Evergreen community providing a competitive open-source option for integrated library systems.

Tim Spindler
Executive Director, CWMARS / Chairperson, Evergreen Oversight Board

Releases & Features

Evergreen 2.12

Release Date: March 22, 2017

Release Manager: Kathy Lussier

Buildmasters: Galen Charlton / Blake Henderson

Distinct New Features: 25

Evergreen 3.0

Release Date: October 3, 2017

Release Manager: Galen Charlton

Buildmaster: Dan Wells

Distinct New Features: 50

NOTABLE NEW FEATURES

- New web staff client
- Digital bookplates
- Search for patrons by date of birth
- Batch editing patron records
- Patron search from place hold screen
- Searchable report templates
- Ebook API integration with Overdrive and OneClickDigital
- Links to other formats & editions from catalog record page

INFRASTRUCTURE

They may not be as exciting as new features, but infrastructure improvements lead to better performing and more stable software. In 2017, Evergreen saw many improvements with large changes to its search code, the holds targeter, the EDI order generator, display fields, and time zone awareness.

INTERNATIONALIZATION

In early January 2017, Nawras Othman, a volunteer from a library in Jordan, showed interest in helping to implement Evergreen in Arabic. She submitted string translations for Arabic as well as changes to Evergreen's catalog code to properly support right-to-left (RTL) language transitions.

3 Commits A Day For A Year

844 CODE COMMITS

41 CONTRIBUTORS

279 DOC COMMITS
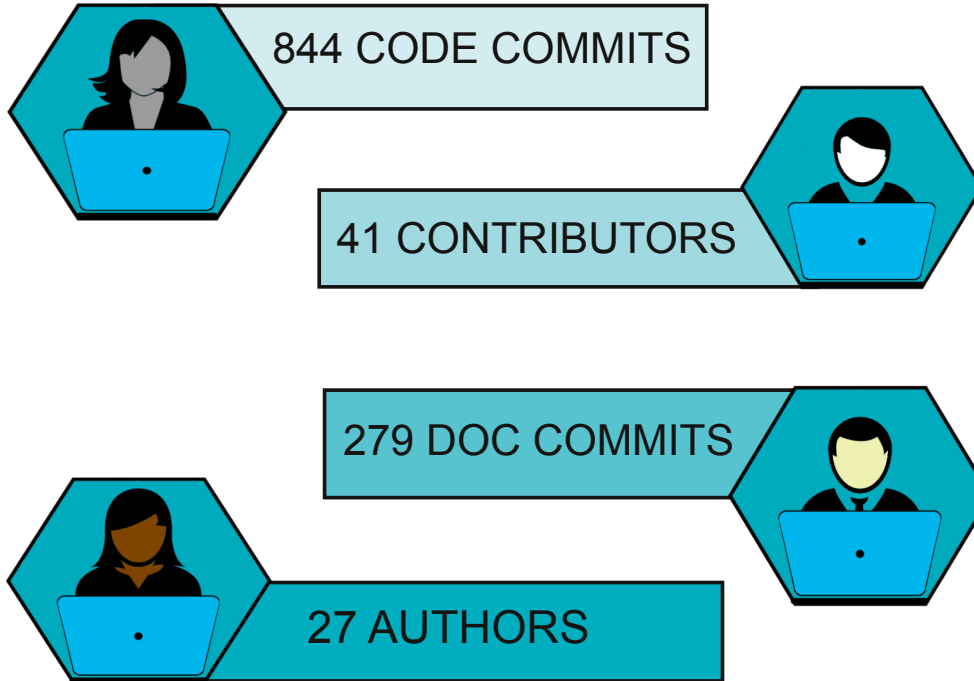
27 AUTHORS

Alex Cautley

Andrea Neiman

Cesar Velez

Jakub Kotrla

Jeanette Lundgren

Jillianne Presley

Linda Jansova

Nawras Othman

Rogan Hamby

Sam Link

Skye Howard

Contributors

Contributors are our body and spirit, whether they are working for a library, a vendor, or committing their own time. Software neither writes nor tests itself, and documentation must be forced into existence.

NEW CONTRIBUTOR SPOTLIGHT!

Cesar Velez of Equinox in his first year has already contributed 43 patches and sign offs.

TOP 10 DOCUMENTERS

Angela Kilsdonk (Equinox)
Ben Shum (Evergreener.net)
Bill Erickson (KCLS)
Dan Scott (Laurentian University)
Galen Charlton (Equinox)
Jane Sandberg (Linn-Benton CC)
Jeanette Lundgren (CW MARS)
Jillianne Presley (Linn-Benton CC)
Kathy Lussier (MassLNC)
Remington Steed (Calvin College)

TOP 10 CODERS

Ben Shum (Evergreener.net)
Bill Erickson (KCLS)
Cesar Velez (Equinox)
Chris Sharp (GA PINES)
Dan Scott (Laurentian University)
Galen Charlton (Equinox)
Jason Etheridge (Equinox)
Jeff Davis (BC Libraries Coop)
Kathy Lussier (MassLNC)
Mike Rylander (Equinox)

TOP 10 TESTERS

Ben Shum (Evergreener.net)
Bill Erickson (KCLS)
Chris Sharp (GA PINES)
Dan Wells (Calvin College)
Galen Charlton (Equinox)
Jane Sandberg (Linn-Benton CC)
Jason Etheridge (Equinox)
Jason Stephenson (CW MARS)
Kathy Lussier (MassLNC)
Mike Rylander (Equinox)

2017 Evergreen International Conference

The 2017 conference took place in April in Covington, KY, hosted by Kenton County Public Library, The Consortium of Ohio Libraries, Evergreen Indiana, Asbury Theological Seminary, and Asbury University. 52 people signed up for the pre-conference, and 167 people for the full event. The pre-conference included a hackfest, EOB meeting, and four pre-conference sessions on reports, privacy, the web client, and de-duplication.

Dave Schroeder, Director of Kenton County Public Library, welcomed everyone and keynote speaker Catherine Devlin started the conference off with "Open Source Society."*

The conference was three days of presentations and sessions on containers and cloud hosting, migrations, web client UI, and

receipts. Interest groups met to discuss cataloging, circulation, acquisitions, documentation, serials, & system administration.

For the first time, merchandise was available. The most popular item was the t-shirt with a quote from Bill Ott.

The conference reception took place on Thursday night in the atrium of the hotel. Friday night attendees braved inclement weather to go on dine arounds, pub crawls, a mural tour, and a Reds baseball game.

The conference attendees made their way home, some with long airport delays, but with a refreshed sense of community and some new knowledge to take back and share with their staff and patrons.

* bit.ly/evergreen2017keynote
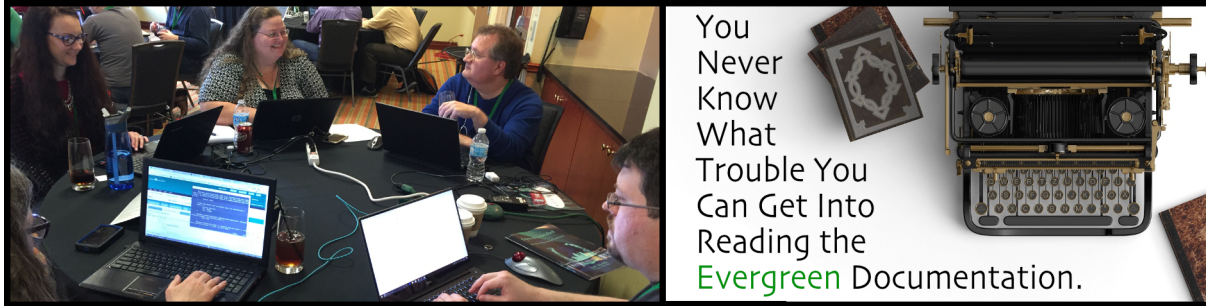
2017 Hack-A-Way

For the second year the Hack-A-Way was graciously hosted by Evergreen Indiana at Fort Benjamin Harrison where we met in what had been the general's office when it was an active military base.

There is a lot to producing an ILS. You see parts of the process online. By this standard the Hack-A-Way was very successful: we saw nearly 4X the number of commits as we did on an average day. Like writing a story, development rarely has a beginning and end point that doesn't require skill and creativity to guide it. However, an ILS isn't an anthology. Creating a full library services software package means working together and long term planning.

In the room, at meals, and during walks we talked about Evergreen in pieces and as a whole. A few things tackled were Hatch implementation, a pure Angular OPAC, managing test data, and upgrading Angular itself. You can see just some of the accomplishments here – bit.ly/hackaway17.

Anyone interested in becoming involved in Evergreen development should review the wealth of information on the community wiki for new developers. https://wiki.evergreen-ils.org/

For Every Feature A Doc Is Born

You
Never
Know
What
Trouble You
Can Get Into
Reading the
Evergreen Documentation.

The Documentation Interest Group (DIG) works with developers, library workers, and other community members to keep Evergreen's documentation up-to-date with the software's increasing features, capabilities, and complexities.

Evergreen's docs are a huge asset to our community. And when I say huge, I'm not joking: at the time of writing, the official 3.0 manual sprawls across 832 pages in its PDF form. It's a challenge to get the right content to the right people in such a large document. The Documentation Interest Group (DIG) spent 2017 on this problem, culminating in the release of eight new manuals, each developed for a specific audience. Catalogers now have a manual of their own, as do acquisitions staff, front-line circulation staff, reference staff, serials staff, and system administrators. A separate manual also helps systems administrator and developers who want to integrate Evergreen with other applications. All manuals are available at docs.evergreen-ils.org.

The Evergreen Forest

Since the first conference we have tried to capture the growth of Evergreen with maps, and it has always been filled with disclaimers. Evergreen is free and freely available. While we do annual surveys, no one has to respond. There are libraries using Evergreen not reflected in our numbers because they are happy using the software without participating in the larger community. And while we'd love to have them at the conference and on the listservs I can't help but be thrilled that they find it just works for them.

2,000 Libraries Using Evergreen
900 Municipalities & Organizations

Standalone Libraries 35%

Consortia 46.7%

Multi-Branch Libraries 18.3%
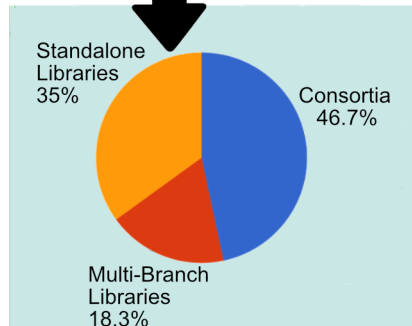
10,500,000 Users
24,500,000 Service Population
92,500,000 Circulations
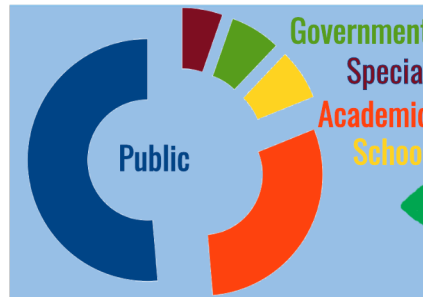
New Libraries

+ 69 Libraries including...
Urban High Schools
European Universities
Government Agencies
Public Libraries Of All Sizes

Public

Government
Special
Academic
School

Locations are approximate and represent areas that Evergreen is known to be used and may represent multiple users.

Spotlight on Homer Public Library

Homer Public Library is a small library in Alaska serving a population of 13,000 that has been using Evergreen since 2013. It was one of the first libraries to use Evergreen 3.0 in the fall of 2017.

Why did your library choose Evergreen?

We started shopping around because we were unhappy with the customer service, lack of customizations, and cost of our former ILS. Evergreen was chosen because it had the flexibility we were looking for and the open source price tag (free!) justified the added costs it would take to switch software. We started the process of migrating in December 2012, utilizing Equinox's migration services, and went live in March 2013.

How large is your library?

We are a single-branch library and currently the only Evergreen library in Alaska. Homer is a rural town of 5,200 but we serve a population of 13,000 spread over miles of gravel roads, as well as remote villages accessible only by boat or

Homer Public Library (completed in 2006) was the first LEED Silver Certified public building in Alaska. The sustainable landscaping attracts moose, sandhill cranes, and neighborhood chickens, in addition to visitors from around the world. Homer PL is a Library Journal Star Library and is on Fodor's Travel list as one of the best libraries in the United States.

plane. In 2017 we circulated 173,069 items, a new record for our library.

What has been the best Evergreen feature for your library? The biggest challenge?

Overall, the high level of granularity within Evergreen makes us very happy. Since moving to Evergreen we've felt in control of our ILS instead of the other way around. Some staff favorites are the ability to exclude our digital collection and unavailable items from searches, text/email hold notifications, and customizable receipt templates. It would be safe to say that one of the favorites for our patrons is the emailed courtesy notices; we receive positive feedback about that feature almost daily!

Among our staff, reports win for the most frequently resented module because of the often-mysterious fields within the interface. Our biggest challenges are partly our own doing as we've kept up with the ambitious upgrade schedule set by the community. We have been using 3.0 since October and are waiting for some kinks to be worked out before using the web client.

"Since moving to Evergreen we've felt in control of our ILS instead of the other way around."

- Holly Brennan, Technology Specialist
Homer Public Library

Webby Takes Flight

One of the hallmarks of the Evergreen Project is our willingness to try new things. On a technical level, this has manifested in a number of technology experiments over the years. Some of these were not directly visible to users, but others are very visible. In particular, Evergreen 3.0, which was released in October of 2017, represents a major milestone: the full availability of a web-based interface for staff functions. This will replace the previous staff client and gives the project a platform on which we can more easily add new functionality over time to support Evergreen library staff. Our ultimate users are of course library patrons, but supporting staff work matters too.

As release manager for 3.0, I had the privilege of announcing the release of 3.0.0, but it would not have been possible without the efforts of many people and

institutions to write code and documentation, test the software, and discuss how it should function. Evergreen embodies the passion and sheer thoughtfulness of our community, and we should all be proud as we move it forward.

Galen Charlton,
Equinox Open Library Initiative, 3.0 Release Manager

Thanks Are Extended To:

BCLibraries
COOPERATIVE

EVERGREEN®

#evgils

Twitter: @EvergreenILS

Website: www.evergreen-ils.org

IRC: #evergreen on freenode

Facebook: www.facebook.com/EvergreenILS/