EVERGREEN: IT'S REVOLUTIONARY

EVERGREEN

INTERNATIONAL CONFERENCE

VALLEY FORGE, PA

April 24–27, 2019
Code of Conduct

All delegates, speakers, sponsors, and volunteers at any Evergreen event are required to agree with the following code of conduct. Organizers will enforce this code throughout the event.

The Quick Version

Evergreen event organizers are dedicated to providing a harassment-free experience for everyone, regardless of gender, gender identity and expression, sexual orientation, disability, physical appearance, body size, race, age or religion. We do not tolerate harassment of event participants in any form. Sexual language and imagery is not appropriate for any event venue, including talks. Event participants violating these rules may be sanctioned or expelled from the event without a refund at the discretion of the event organizers.

Harassment includes, but is not limited to:

- Violent threats, intimidation or personal insults directed against another person.
- Verbal, graphic or written comments related to gender, gender identity and expression, sexual orientation, disability, physical appearance, body size, race, age or religion.
- Posting sexually explicit or violent material.
- Stalking or following, including harassing photography or recording.
- Sustained disruption of talks or other presentations.
- Inappropriate physical contact or sexual attention.
- Posting (or threatening to post) other people’s personally identifying information.
- Advocating for, or encouraging, any of the above behavior.
- Repeated harassment of others. In general, if someone asks you to stop, then stop.

If you are being harassed, notice that someone else is being harassed, or have any other concerns, please contact a member of event staff or an incident responder (identified by name badge ribbons) immediately. Please read the full Code of Conduct at http://evergreen-ilts.org/code-of-conduct/.

Photography, Audio and Video

All attendees must adhere to the Evergreen Event Photography/ Audio/Video Policy posted at http://evergreen-ilts.org/ conference/photography-policy. Attendees will identify their photography preferences through the lanyard color they wear:

Green—Photographs are always okay
Yellow—Ask before photographing
Red—Photographs are never okay

There is no prior opt-in for audio or video recordings. You must always ask before recording.
Welcome to Valley Forge, Pennsylvania!

Welcome to all conference attendees! We hope you enjoy your stay here in lovely Valley Forge.

If you’d like to explore the area, the hotel offers a free shuttle to nearby historic and tourist locations. Valley Forge National Historic Park is just 1.4 miles from the hotel. This Revolutionary War-era site allows you to tour buildings used by General Washington and his troops in the winter of 1777-78. Be sure to explore the museum, which is filled with period firearms, rare documents, and archaeological findings.

Valley Forge Casino Resort offers a 40,000 square-foot gaming floor with 600 slot machines and 50 table games.

The King of Prussia mall is the largest shopping mall on the East Coast with 400 shops.

Philadelphia is just 20 miles away and offers a wide array of museums, parks, national historic sites, and restaurants.

See the Social Activities page on the conference web site for more information!

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**Programs**

**Wednesday, April 24**

9:00 am—4:30 pm........................................

**Developers’ Hackfest**

Room: Quaker

This is an opportunity for Evergreen developers from around the globe to gather to work on projects, do bug fixing and testing, and to discuss new development initiatives. (This room is open for developers all day, feel free to come and go as you wish.)

*Facilitator: Galen Charlton, Equinox Open Library Initiative*

9:00 am—Noon...................................................

**Web Client Receipts, It’s Not Magic**

Room: Buchanan

Learn about print templates in the web client, including adding AngularJS, HTML, and database information. We will format a set of basic templates with graphics, totals, and other tricks. We will also cover working with Hatch and printing to multiple printers. Included will be some of the pitfalls SCLENDs encountered when setting up templates.

*Presenter: Lynn Floyd, SCLENDs*

1:30 pm—4:30 pm...........................................

**Show Me the Money!! Make Evergreen Billing Work for Your Library**

Room: Buchanan

What’s the real difference between Void and Forgive? How can I get a custom report for my cash drawer? If you have questions about Evergreen billing, this pre-conference is for you. We will discuss best practices for using billing at the circulation desk, as well as how to create reports for financial transactions.

*Presenters: Erica Rohlf, Equinox Open Library Initiative, and Angela Kilsdonk, Equinox Open Library Initiative*
Programs

Wednesday, April 24 (Continued)

Cronscript.pm, or How I Learned to Stop Worrying and Program the Evergreen Back End
Room: Conestoga

Ever wondered what happens after you click that button in the staff client? Ever heard of the IDL, cstore, pcru? Ever needed to do something that the staff client just doesn’t do? Ever wanted to power through a mass update with the force of an atomic bomb? Have you learned SQL, but found some updates are trickier than you thought? Don’t know what Perl is? Or want to know more? Then, this is the presentation for you! Our speaker will introduce you to the Evergreen back end, what the pieces are and how they fit together, and to utilities that will make your job easier. You will learn to use those pieces to do things that are awkward or impossible to do in the staff client and how to write code for those crazy requests for mass updates. Most of all, you will learn how to explore, to stop worry, and to program the Evergreen back end.

Presenter: Jason Stephenson, CW MARS

3:20 pm—3:40 pm.................
Afternoon Break
Sponsored by Consortium of Ohio Libraries
Room: Washington

5:30 pm—6:30 pm..........................
Evergreen Oversight Board / The Evergreen Project Board Meeting
Room: Hemlock

Board meetings are open to all who wish to attend.

Thursday, April 25

7:30 am—9:00 am.........
Breakfast
Sponsored by MOBIUS
Room: Hancock/Franklin/Adams

8 am—8:45 am..........................
Student Success Working Group
Room: Quaker
Facilitator: Jane Sandberg, Linn-Benton Community College

Interest Group: Cataloging
Room: Conestoga
Facilitators: J. Elaine Hardy, PINES and Jennifer Weston, NC Cardinal
Equinox is a nonprofit, originally founded in 2007 by the designers and developers of Evergreen. Profit is not our primary motivator – we believe in better libraries! Our customer service is backed by our staff of core Evergreen, Koha, and Fulfillment software developers. And it doesn’t hurt that more than half of our staff are degreed librarians with experience in academic, government, public and special libraries.

Products
Equinox provides a full range of enterprise services to support the Evergreen, Koha, and Fulfillment open source library products. From process planning through ongoing support and maintenance, we will provide the support and expertise you need. We empower libraries through open source technologies!

Services
We provide a full suite of services:

- Private, Cloud-Based, Hosting on our Sequoia Platform
- Help Desk Support & Troubleshooting
- Data Migration & Implementation Services
- Software Customization, Design & Development
- Training & Consultation

Libraries + Open Source Technologies

1-877-673-6457  EquinoxInitiative.org  PO Box 69, Norcross, GA 30091
Keynote: Ather Sharif

Ather designed web sites and apps until a car accident took away his ability to use his limbs. After the accident he realized how inaccessible the web was for people with disabilities and began researching ways to improve it.

In his quest to improve web accessibility, Ather founded EvoXLabs, an initiative dedicated to bridging the gap between technology and people with disabilities. Projects include evoHaX, FAWN, SCI Video Blog, and The Accessible World Conference. At Comcast he works as a Software Engineer on the Core Applications Platforms Team.

Ather’s achievements include 2018 ADA 25 Advancing Leadership Fellow, Google Scholar, Oliver H. M. Jordan Scholar, IBM People with Disabilities Award Winner, and Philadelphia’s Geek of the Year, 2015.

In his spare time, he enjoys drawing terrible stick figures on whiteboards, buying the most unnecessary gadgets on Amazon, and watching the Big Bang Theory.

athersharif.com

Programs

Thursday, April 25 (Continued)

9 am—9:30 am.................................................................
Welcome and Announcements
Room: Hancock/Franklin/Adams

9:30 am—10:30 am..........................................................
Keynote Address: Ather Sharif
Room: Hancock/Franklin/Adams

10:30 am—10:55 am......................................................
Morning Break
Room: Washington

10:55 am—11:45 am......................................................
Evergreen Developer Training Wheels
Room: Buchanan
Have you ever wanted to add a new feature to Evergreen, but weren’t sure where to start? Do you have ideas about optimizing a simple workflow to precisely target a local need? This talk will introduce the building blocks which form the foundation of a web client feature, allowing you to quickly get the client to do something novel (and maybe even useful!). A first step into a larger world.

Presenter: Daniel Wells, Calvin College

Catalogers Know How to Party! Resource Sharing the Cataloging Process
Room: Conestoga
Indiana’s tenure with Evergreen has been highlighted by the first-time automation of over a dozen libraries. We do not have centralized cataloging services but we’ve been leveraging our shared catalog, policies, and training to offer "Cataloging Parties" in support of these libraries during their automation. Cataloging parties bring together catalogers from multiple independent libraries to process hundreds of items in a single day. We will talk about how we coordinate these events, the outcomes we believe are transferable, and suggestions about how you might be able to use this technique with dark collections of all shapes and sizes in your Evergreen community.

Presenter: Anna Goben, Evergreen Indiana

Tags and Alerts and Notes, Oh My!
Room: Ross/Jefferson
The past few releases of Evergreen have gained new functionality for managing "extra" item level information. This session will discuss the differences between item notes, alerts, and tags. It will also cover how to configure and use item tags and item alerts in your catalog.

Presenter: Angela Kilsdonk, Equinox Open Library Initiative

COMCAST

The 2019 Evergreen Conference thanks Comcast for sponsoring the keynote presentation.
Pennsylvania Integrated Library System

is pleased to support and promote the
use of Evergreen in libraries worldwide

www.sparkpa.org

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of the

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Sponsors

An enormous thank you to all of our sponsors for supporting this year’s conference.

We couldn’t do this without you!

Champions

[Logos of Emerald, Equinox, PA|ILS, and SPARK]

Advocates

[Logos of MOBIUS and HSLC]
Programs

Thursday, April 25 (Continued)

11:45 am—1:30 pm...............................
Lunch On Your Own

1:30 pm—2:00 pm...............................
Lightning Talks
Room: Hancock/Franklin/Adams
Have something to show off in 5 minutes or less? Sign up at the registration desk!
Facilitator: Terran McCanna, PINES

2:10 pm—3:00 pm...............................
Flying without a Net: Vendor E-Resource Discovery within Evergreen without Bibliographic Records
Room: Buchanan
PINES, GADD (Georgia Download Destination), and RBdigital worked together to develop an interface to search and access a vendor's e-resources from within the Evergreen OPAC without importing bibliographic records. Patrons can authenticate, checkout, place holds, and access other vendor functionality from within the OPAC. Authentication considers which sets of resources the patron's home library provides access to, and only searches and displays the appropriate materials. The code for the RBdigital integration is open source and can be built upon by any other e-resource vendor.

Presenters: J. Elaine Hardy, PINES, and Mike Pyland, RBmedia / Recorded Books, Inc.

Batches, Baskets, Buckets and Bookbags
Room: Conestoga
Overview of the different ways to work with batches of items and bibs in Evergreen, including item status, copy and record buckets, My Lists/Bookbags, with lots of examples and cool tips and tricks.

Presenter: Elizabeth B. Thomsen, NOBLE

Smoldering Embers—SPARK tries Webby!
Room: Ross/Jefferson
Moving to Evergreen v3.1 gave SPARK libraries the opportunity to begin using Webby. Join us for a presentation and discussion of how the SPARK Consortium introduced Webby to its members and how they dealt with the fallout and after effects.

Presenter: Lugene Shelly, PaILS

3:00 pm—3:50 pm...............................
Afternoon Break: Vendor Showcase
Sponsored by EBSCO
Room: Washington
Programs

Thursday, April 25 (Continued)

4:00 pm—4:50 pm..........................................

Demystifying Holds Features within Evergreen
Room: Buchanan
During this session, we’ll move the discussion beyond the topic of First In First Out hold capturing. We’ll take a closer look at hard boundaries, hold policies, proximities, opportunistic captures, stalling, hold weights, and holds related library settings.

Presenter: Erica Rohlf, Equinox Open Library Initiative

Creating New Relationships with SPARK: a Migration Story
Room: Conestoga
This session details the journey of 11 independent libraries, with one being unautomated and the others using 4 different ILSes, to create a resource sharing cooperative from the ground up. Hear about the hurdles overcome in handling the migration while also introducing the concept of working within a shared environment to their staff and Boards, the level of coordination needed to make the idea work, and how it is faring 4 months after go-live.

Presenters: Angie Devers, PaILS, and Mark Sullivan, PaILS

The (EDI) Message in the (Acquisitions Module)
Room: Ross/Jefferson
EDI doesn’t have to be as mysterious as a Nancy Drew story. We’ll take a high-level look at what EDI does in the Acquisitions module, as well as tips and tricks that users can use when working with EDI.

Presenter: Tiffany Little, PINES

6:30 pm—8:30 pm...........

Reception
Sponsored by Emerald Data Networks
Room: The Vault

Friday, April 26

7:30 am—9 am.............................................

Breakfast
Room: Hancock/Franklin/Adams

8 am—8:45 am.............................................

Interest Group: Circulation
Room: Ross/Jefferson
Facilitator: Diane Disbro, Scenic Regional Library

Interest Group: Serials
Room: Conestoga
Facilitator: Erica Rohlf, Equinox Open Library Initiative

Interest Group: Documentation
Room: Buchanan
Facilitator: Jane Sandberg, Linn-Benton Community College

9 am—9:30 am.............................................

Evergreen Oversight Board Update - State of Evergreen
Room: Hancock/Franklin/Adams
Facilitator: Mike Rylander, Equinox Open Library Initiative

9:40 am—10:30 am...........................................

Evergreen Documentation: How to Use It for Reference and Training Purposes -- AND How to Participate in Making It Better!
Room: Ross/Jefferson
This program will start with a tour of existing Evergreen documentation on docs.evergreen-ilis.org—including tools for searching and downloading sections as desired. Various ways to incorporate this documentation into everyday practice and training will be presented. Focus will then shift to the Documentation Interest Group (DIG) so that attendees can learn how to participate!

Presenters: Angela Kilsdonk, Equinox Open Library Initiative, and Katie Greenleaf Martin, Blair County Library System

The Joy of Booking: Getting Acquainted with the Booking Module
Room: Conestoga
The booking module can be used to reserve rooms, to handle tech equipment and laptop checkout, and to make sure that a certain DVD is available when a faculty member wants it for their class. At the same time, it’s not widely used and is mysterious to a lot of Evergreen users. Bring your laptop or tablet to this session to learn hands-on how you can use it in your library.

Presenter: Jane Sandberg, Linn-Benton Community College

Cataloging Comics and Manga in Evergreen
Room: Buchanan
The rise in popularity of graphic literature has been a boon to readers and a bane of catalogers. From companies that reuse ISBNs to repackaged serial runs with unclear titles comics and manga present some challenges. The lack of consistency in cataloging these kinds of materials results in an impact on the most public feature in Evergreen - search. Join us to talk about how to catalog modern comic and manga formats, issues to look out for in Evergreen and how consistent cataloging can aid weeding, collection development and deduplications.

Presenters: Rogan Hamby, Equinox Open Library Initiative, and Meg Stroup, SCLENDS
Hosting
Technical Support
ILS Migrations
Language Translation Services
Customizations

Evergreen. Your Way.

Proud Champion Sponsor of the Evergren International Conference 2019
Programs
Friday, April 26 (Continued)

10:30 am—10:55 am
Morning Break
Room: Washington

10:55 am—11:45 am
To Buy or Not to Buy? Using Evergreen to Create Purchase Requests
Room: Buchanan

The Scranton Public Library has been using patron requests for a few years to help facilitate patron driven acquisition requests without all the Excel spreadsheets. We’ll talk about how we set it up (spoiler alert: EDI ordering is involved) and how we do it now. We’ll also showcase the new and improved patron requests that are coming in 3.2.

Presenters: Christina Thomas, Scranton Public Library, and Sylvia Orner, Scranton Public Library

Writing Angular for Evergreen
Room: Quaker

Evergreen 3.2.0 saw the advent of the Angular framework for parts of the web staff interface. Over the next few years, there are a number of legacy interfaces that need to be ported to Angular — and of course, new features to write. To help level up our developer community’s familiarity with Angular, Galen Charlton will lead a workshop on the basics of TypeScript, Angular, and Evergreen’s new Angular components. The workshop will include presentations on the fundamentals, followed by exercises to add and enhance Angular interfaces in the web staff client. By the end of the workshop, participants will have learned more about Angular and how it is used in Evergreen and have started or completed work on making a change to one of Evergreen’s Angular interfaces. Participants should be familiar with JavaScript and how to make patches to Evergreen, and should be prepared to bring a laptop with an Evergreen development environment on it.

Presenter: Galen Charlton, Equinox Open Library Initiative

I promise It’s Not Rocket Science: An Exploration of Launchpad
Room: Ross/Jefferson

The goal of this program is to demystify the Evergreen community’s bug-reporting system, Launchpad. I’ll cover searching & filing bugs, best practices, tags and how to use them, and allow time for a Q & A / demo at the end. Participants are encouraged but not required to have an active Launchpad account.

Presenters: Andrea Buntz Neiman, Equinox Open Library Initiative

Scrualoging - Formatting and fixing MARC records
Room: Conestoga

I know we’ve said it before but we’ll say it again. MARC records are wrong sometimes and we need tools to help. We have spent hundreds of hours looking over spreadsheets and code to determine the best way to apply the right leader byte 6/7 and 008 bits to fix the format of MARC records that have an identity crisis. We will show our approach from the cataloging committee meetings to the instituted code used to make the changes. Ultimately creating a more uniformed and deduplicated catalog!

Presenters: Kate Coleman, Jefferson County Library, Ron Eifert, Sikeston Public Library, and Blake Graham-Henderson, MOBIUS

11:45 am—1:30 pm
Lunch On Your Own

1:30 pm—3:20 pm
The Usual Suspects : Deduplicating Bibliographic Records
Room: Buchanan

Join me to chat about deduplication methods in Evergreen. We will talk about migration dedupes, special projects and for regular maintenance as well as how they change when we look at them in consortia versus single library environments. We will start with a brief overview of how merging records works in Evergreen. While we will talk about cataloging and technical issues in Evergreen it’s also critical to address how to manage the project and set expectations for best results. From there we will take a high level look at defining the scope of a project and the goals of creating targeted sets of records. Finally, we will look at MARC data how to distinguish between what records should be merged despite records not being identical and how to mitigate the inherent dangers of any deduplication project.

Presenter: Rogan Hamby, Equinox Open Library Initiative

Making the Most of Evergreen Reports
Room: Ross/Jefferson

Evergreen’s built-in report-creating feature is powerful, extensible, and allows for very fine-grained and targeted data retrieval. This extended session covers the design of the reports interface and how you can select and join together the best sources you can for your libraries’ reporting needs. We’ll peek under the hood some so you’ll understand better how Evergreen reports work from the database up. Includes practical real-life examples gleaned from years of supporting and troubleshooting PINES reports. Updated for the web client.

Presenter: Chris Sharp, PINES

Consortium Leaders Round Table
Room: Conestoga

A chance for consortium leaders to meet to discuss any and all issues that consortiums face in the quest to provide equal access to their patron groups including methods for sharing resources, types of courier services, funding structures, and more.

Facilitator: Elizabeth McKinney, PINES
The page contains a schedule of events at a conference. The events are categorized into different timeslots and sessions, with descriptions of what each session covers. The content is written in a formal style, typical of conference programs. The layout is structured with time slots and descriptions of the sessions, including names of speakers and topics covered. The page also includes breaks and social events like Dine-Arounds and Pub Crawls. The formatting is clean and easy to read, with clear headings and subheadings for different sections of the schedule.
Exhibitors

Location: Washington
Thursday and Friday, 8 am—5 pm

Brodart Co.
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John Sommers
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Edelweiss / Above the Treeline
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TBS (Today's Business Solutions)
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Vivienne Porter
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Donna Bacon
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Illion Digital Tech Solutions
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Sean Young
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Unique
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Josh Neisler
jneisler@uniquelibrary.com

Get Your Evergreen Merch!
Support Evergreen by shopping at the Evergreen Merchandise booth (located near the Registration Table). All proceeds support the Evergreen project.
<table>
<thead>
<tr>
<th>Day</th>
<th>Buchanan</th>
<th>Conestoga</th>
<th>Keystone</th>
<th>Quaker</th>
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<tbody>
<tr>
<td><strong>Wed. April 24</strong></td>
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<tr>
<td>9:00 am—12:00 pm</td>
<td>Web Client Print Templates</td>
<td>Analyzing for Collection Dev't</td>
<td>Documentation Hackfest</td>
<td>Developers' Hackfest</td>
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<td>12:00 pm—1:30 pm</td>
<td>Pre-conference Luncheon (Hancock/Franklin/Adams)</td>
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<td>1:30 pm—4:30 pm</td>
<td>Evergreen Billing</td>
<td>Programming the Back End</td>
<td>Documentation Hackfest</td>
<td>Developers' Hackfest</td>
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<td>3:20 pm—3:40 pm</td>
<td>Afternoon Snack Break (Washington)</td>
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<td>The Evergreen Project Board Meeting (Hemlock)</td>
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<td><strong>Thurs. April 25</strong></td>
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<td>Interest Group: Cataloging</td>
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<td>Interest Group: Student Success</td>
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<td>9:00 am—9:30 am</td>
<td>Welcome and Announcements (H Hancock/Franklin/Adams)</td>
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<td>Keynote Address— Ather Sharif (H Hancock/Franklin/Adams)</td>
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<td>10:55 am—11:45 am</td>
<td>Developer Training Wheels</td>
<td>Cataloging Parties for Sharing Cataloging Knowledge</td>
<td>Item Notes, Alerts, and Tags</td>
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<td>11:45 am—1:30 pm</td>
<td>Lunch Break (on your own)</td>
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<td>1:30 pm—2:00 pm</td>
<td>Lightning Talks (H Hancock/Franklin/Adams)</td>
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<td>2:10 pm—3:00 pm</td>
<td>E-Resource Discovery Without Bib Records</td>
<td>Batches, Baskets, Buckets, and Bookbags</td>
<td>SPARK's Migration to Webby</td>
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<td>Afternoon Snack Break and Vendor Showcase (Washington)</td>
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<td>4:00 pm—4:50 pm</td>
<td>Demystifying Holds Features</td>
<td>SPARK: Creating a Resource Sharing Cooperative</td>
<td>EDI in the Acquisitions Module</td>
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<td>Reception (The Vault)</td>
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<td><strong>Fri. April 26</strong></td>
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<td>Interest Group: Serials</td>
<td>Interest Group: Circulation</td>
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<td>9:00 am—9:30 am</td>
<td>The Evergreen Project Update - State of Evergreen (H Hancock/Franklin/Adams)</td>
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<td>9:40 am—10:30 am</td>
<td>Cataloging Comics and Manga</td>
<td>Evergreen Booking Module</td>
<td>Evergreen Documentation</td>
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<td>Purchase Requests in Evergreen</td>
<td>Formatting and Fixing MARC Records</td>
<td>Using Launchpad for Bug Reporting</td>
<td>Writing Angular for Evergreen</td>
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<td>11:45 am—1:30 pm</td>
<td>Lunch Break (on your own)</td>
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<tr>
<td>1:30 pm—3:20 pm (Double Session)</td>
<td>Deduplicating Bibliographic Records</td>
<td>Consortium Leaders Round Table</td>
<td>Evergreen Reports</td>
<td>New Features in Evergreen 3.2 and 3.3</td>
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<tr>
<td>3:20 pm—3:40 pm</td>
<td>Afternoon Snack Break (Washington)</td>
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<tr>
<td>3:40 pm—4:10 pm</td>
<td>Lightning Talks (H Hancock/Franklin/Adams)</td>
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<tr>
<td>4:15 pm—5:05 pm</td>
<td>Sharing Resources Between Unaffiliated Libraries</td>
<td>User Groups Panel &amp; Round Table</td>
<td>Spine and Pocket Labels</td>
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<tr>
<td>6:15 pm</td>
<td>Dine Aroun ds / Pub Crawl (see Registration Desk)</td>
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<tr>
<td><strong>Sat. April 27</strong></td>
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<tr>
<td>7:30 am—9:00 am</td>
<td>Breakfast (H Hancock/Franklin/Adams)</td>
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<tr>
<td>8:00 am—8:45 am</td>
<td>Interest Group: Acquisitions</td>
<td>Interest Group: Sys Admins</td>
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<tr>
<td>9:00 am—10:00 am</td>
<td>Developer Update (H Hancock/Franklin/Adams)</td>
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<tr>
<td>10:00 am—10:30 am</td>
<td>Morning Coffee Break (Washington)</td>
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<td>10:30 am—11:30 am</td>
<td>Discussing the Future of Evergreen (H Hancock/Franklin/Adams)</td>
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</table>

*See conference website for additional social activities and local events*