

# Evergreen Documentation:

how to use it for reference and training purposes --  
AND how to participate in making it better!

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<http://bit.ly/DIGevgils19>

Link to handouts

# <http://docs.evergreen-ils.org/>

- How to find what you are looking for:
  - Search function
  - Broken out by module (Acquisitions, Circulation, Cataloging, OPAC, Serials, etc.)
    - Most sub-sections broken out by screen
    - Each includes an 'introduction section' that includes basic information before going into module-specific topics
  - Consolidated manual includes content from all manuals
- Other things on the main docs page
  - Current development version
  - Database schema
  - Older-style manuals

# Caveats and cautions

- Pay attention to version number
  - Especially when using the search function
  - Webby vs XUL
    - If you are still using XUL, use 2.12 documentation
- Remember that EG documentation is a work in progress
  - & may not reflect customizations made by your library/consortium (such as OPAC carousels, discovery layers, etc.)
  - Not everything is documented
  - Not all the existing documentation is up to date
    - <https://bugs.launchpad.net/evergreen/+bug/1776763>
    - Example XUL documentation: [http://docs.evergreen-ils.org/2.11/\\_sorting\\_columns.html](http://docs.evergreen-ils.org/2.11/_sorting_columns.html)
    - Not all features of this documentation in updated docs:  
[http://docs.evergreen-ils.org/dev/\\_column\\_picker.html](http://docs.evergreen-ils.org/dev/_column_picker.html)

# Incorporate this documentation into everyday practice and training

- Print it out!
  - Formatting can be a little bit odd -- print desired pages from PDFs
- Link to documentation when someone asks you a question so that they can do their own research
- Use documentation as a starting point to create library-specific handouts for workflows and policies
- What are your ideas for using the documentation?

# Please steal this documentation!



You are free to:

- Share — copy and redistribute the material in any medium or format
- Adapt — remix, transform, and build upon the material for any purpose, even commercially.

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# Open-Source and Stewardship

- Community-driven code and Community-driven documentation
- We are the stewards of the documentation and are responsible for maintaining and improving it
- We are empowered to create documentation that truly meets the needs of the community
  
- What do you want to see?
  - One set of documentation to rule them all?
  - “Getting started” manual for libraries that are new to Evergreen?
  - Focus on features that are more heavily used by small libraries? By consortia?

# Signing up for the DIG list (we're fun!)

<https://evergreen-ils.org/communicate/mailling-lists/>

## **Evergreen Documentation**

### **Evergreen Documentation Discussion List**

This list is for planners, technical writers, trainers, documentation contributors, etc. participating in or interested in following the progress of the Evergreen documentation project.

To subscribe, go to <http://libmail.georgialibraries.org/mailman/listinfo/open-ils-documentation>










# Working on the documentation

## Beginner Workflow

- Telling DIG about anything that seems wrong
  - Corrections of typos
  - Corrected step-by-step instructions
  - Updated screenshots
  - Telling DIG of missing sections
- What you need: Email!
  - Email your documentation updates to DIG:  
[open-ils-documentation@list.georgialibraries.org](mailto:open-ils-documentation@list.georgialibraries.org)
  - Please include the following information in your email:
    - URL of the documentation web page that needs to be updated
    - The part of the web page you are referring to (e.g. section heading, paragraph number, a nearby phrase, etc.)

# Example of reporting by email

catalog vs. catalogue  Lists/Evergreen/DIG 


 **Linnae Cintron** Wed, Apr 24, 3:04 PM (1 day ago)     
to me 

Noticed the words CATALOG and CATALOGUE are used within the same document. When CATALOGUE is used it has the article "THE" in front of it. However when CATALOG is used, it is more within the context of it being part of the terminology of the instructions without an article in front of it. Also noticing no consistency between using upper and lower case C. There are examples of this differentiation on the links below:

[http://docs.evergreen-ils.org/reorg/3.2/cataloging/\\_editing\\_copies\\_in\\_a\\_bucket.html](http://docs.evergreen-ils.org/reorg/3.2/cataloging/_editing_copies_in_a_bucket.html)

[http://docs.evergreen-ils.org/reorg/3.2/cataloging/\\_deleting\\_copies\\_from\\_the\\_catalogue.html](http://docs.evergreen-ils.org/reorg/3.2/cataloging/_deleting_copies_from_the_catalogue.html)

[http://docs.evergreen-ils.org/reorg/3.2/cataloging/\\_placing\\_holds\\_on\\_copies\\_in\\_a\\_bucket.html](http://docs.evergreen-ils.org/reorg/3.2/cataloging/_placing_holds_on_copies_in_a_bucket.html)



<https://bugs.launchpad.net/evergreen/+bug/1826256>

# Working on the documentation

## Beginner+ Workflow

- Write (or re-write) documentation in **any format** and send it to the documentation email list: [open-ils-documentation@list.georgialibraries.org](mailto:open-ils-documentation@list.georgialibraries.org)
- DIG will review your files, convert them to AsciiDoc format and add them to the official documentation when they are ready.
- What you need: a text editor and email!
- Please include the following information in your email:
  - URL of the documentation web page that needs to be updated
    - The part of the web page you are referring to (e.g. section heading, paragraph number, a nearby phrase, etc.)
  - Attach any screenshots that can be used in the documentation

# Working on the documentation

## Beginner to Intermediate Workflow

<https://bugs.launchpad.net/evergreen/+filebug>

- Signing up for Launchpad
- If you're not sure if it's a bug or not, please feel free to email the DIG list

### Report a bug

Please describe the bug in a few words, for example, "weather applet crashes on logout":

**Summary:**

No similar bug reports were found.

**Summary:**

**Further information:**

# Working on the documentation

## Intermediate Workflow

What you need:

- A Github account
- A Launchpad account
- [DIG Style Guide](#)
- [DIG AsciiDoc Cheat Sheet](#) (or other AsciiDoc resources)

# Working on the documentation

## Intermediate Workflow

Helpful tools:

- Text editor like Notepad++
- Video of a variation of this workflow: [https://youtu.be/XiVjO\\_S0Y-s](https://youtu.be/XiVjO_S0Y-s)
- AsciiDocLIVE: <https://asciidoclive.com/edit/scratch/1>
  - Good tool for learning AsciiDoc!

# AsciiDoc Documentation Sample

```
5
6 Adding a Copy Alert
7 ~~~~~
8
9 Copy Alerts can be added to new copies or existing copies using the Volume/Copy Editor. They can also be added
10 directly to items through the Check In, Check Out, Renew, and Item Status screens.
11
12 To add a Copy Alert in the Volume/Copy Editor:
13
14 +++++
15
16 1. Within the _Volume/Copy Editor_, scroll to the bottom of the screen and click on *Copy Alerts*.
17
18 image::media/copyalert1.PNG[]
19
20 2. A _New Copy Alert_ window will pop up.
21
22 image::media/copyalert2.PNG[]
23
24 3. Select an alert _Type_ and enter an alert message. Check the box next to _Temporary_ if this alert should not
25 appear after the initial alert is acknowledged. Leaving the Temporary box unchecked will create a persistent alert
26 that will appear each time the action to trigger the alert occurs, such as check in or check out.
27
28 4. Click *OK* to save the new Copy Alert. After adding an initial copy alert, clicking on the *Copy Alerts* button
29 in the _Volume/Copy Editor_ will allow you to add another Copy Alert and to view and edit Existing Copy Alerts.
30
31 image::media/copyalert3.PNG[]
32
```

Thank you!