EVERIG REEN Community Annual Report





Meg Stroup @StroupMeg · 3 May 2018 If you're looking for an engaged and committed group of people, check out these ideas from one single brainstorming session. Grateful to be part of the Evergreen community. Onward! #evglis #evglis18

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Looking Back on 2018

Change is the only constant.

2018 saw our community come together to create and improve many Evergreen features, improve documentation and outreach efforts, and work towards important future-proofing to keep the ILS we love at the leading edge of technology and innovation. The official deprecation of the venerable XUL client means we have moved fully into the Web world, and integration of Angular 6 in place of older AngularJS and Dojo infrastructure is reducing our technical debt and lowering the effort of future development and maintenance. More than forty individuals contributed to over 700,000 changed lines of code and documentation across more than 800 commits to the official repository, maintaining our record of strong technical participation.

The Evergreen source code isn't the only thing changing in our community, of course. We made significant progress in our work to create a standalone non-profit organization for Evergreen. The Evergreen Project was incorporated, and we are, as of this writing, finalizing the required IRS documentation to finish the process. This has been a large effort and we believe it will allow our community to continue to change and improve in ways that will benefit all users of the Evergreen ILS.



The future may not be certain, but it is bright!

Mike Rylander Chair, Evergreen Oversight Board President, Equinox Open Library Initiative

Releases & Features

Evergreen 3.1

Release date: 3/28/18

Release Manager: Dan Wells

Buildmaster: Dan Wells

New Features: 24

Evergreen 3.2

Release date: 10/3/18

Release Manager: Bill Erickson

Buildmaster: Dan Wells

New Features: 31

Alternate patron hold pickup Auto renewal of items out Batch actions from search

Billing statement view

Copy alerts matrix

Goodbye to XUL

With the 3.2 release, the old XUL client was officially removed from service. All future Evergreen releases will exclusively use the web staff client which has been available for production use since 3.0. The web client is supported for both Chrome and Firefox browsers.

Emergency closing handler Multilingual search in OPAC

Patron alternate/preferred names

Place multiple holds on a title

Community Cataloging

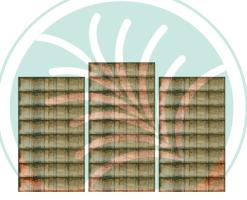
Significant improvements to the web client's Cataloging interfaces arrived in 2018. An impressive twenty-eight Cataloging bug fixes (one a large omnibus fix) went into 3.1 and 3.2, representing the work of several community developers & multiple funding partners.

Code Counts

The Evergreen community puts some wear and tear on keyboards. We don't have statistics for everything people do but we do have them for everything that goes into our Git repository.

In 2018 alone Evergreen added 19,784,124 characters across 407,861 lines of code submitted by 44 dedicated developers. With deletions we get to 700,000 lines! For comparison the text of *A Tale of Two Cities* comes in at 792,985 characters. That's 25 copies of

Dicken's classic. No one is going to put Evergreen's source code on a Lit 101 reading list but we do think it's pretty awesome since it circulates everything on those lists.





We would also like to recognize **Cesar Velez (EOLI)** and **Chris Sharp (GPLS).** Both were selected to become core committers in 2018. Congratulations!

Committed to Evergreen

Evergreen is not an anonymous collective. Each contribution comes from a human dedicated to improving the library experience. Every contribution helps make Evergreen what it is. These are the contributors with five or more commits in 2018.

Fifteen people submitted documentation to the Git repository 172 times including:

Kevin Tran (Calvin College), Andrea Buntz Neiman (EOLI), Angela Kilsdonk (EOLI), Kathy Lussier (MassLNC), Jane Sandberg (Linn-Benton CC), Remington Steed (Calvin College)

While writers were writing, coders were coding. We had thirty-six committers to the code base during 2018 and we wish we had room to recognize all 719 of their commits! Jeff Davis (BC Libraries Coop), Remington Steed, Dan Wells (Calvin College), Kyle Huckins (Catalyst), Jason Stephenson (CW MARS), Galen Charlton, Jason Etheridge, Rogan Hamby, Mike Rylander & Cesar Velez (EOLI), Ben Shum (Evergreener.net),

Chris Sharp (GPLS), A. Bellenir (GRPL), Jason Boyer (Indiana State Library), Bill Erickson (KCLS), Garry Collum (Kenton Library), Jane Sandberg (Linn-Benton CC), Kathy Lussier (MassLNC)

Missouri Bound

MOBIUS hosted the 2018 Evergreen International Conference, April 30 - May 3 in St. Charles, Missouri. The conference drew about 170 attendees and 10 exhibitors, with 61 pre-conference attendees.

The first day consisted of four pre-conferences focused on authority control, SQL, serials, and searching; the developer and documentation hackfest; and an Evergreen Oversight Board (EOB) meeting. The full conference began with interest groups and round table meetings, then officially kicked off with a keynote from Crystal Martin focusing on diversity in the tech world. Over the course of the conference there were 23 breakout sessions, 8 interest groups, various round table meetings, lightning talks, EOB and developer updates, and a final guided session about for the future of Evergreen. In addition to sessions and other learning opportunities, there was also ample time for socializing, visiting with exhibitors, purchasing Evergreen merchandise, and exploring the St. Charles area. Attendees could participate in a ghost tour of historic St. Charles, several dine arounds, a pub crawl, a Cardinals baseball game, and a lovely reception at the hotel. Presentations and slides can be found at https://evergreenils.org/conference/2018-evergreen-international-conference/2018-conferencepresentation-slides-and-files/ .

Hack-A-Way



This year the Hack-A-Way returned to Atlanta, GA, again hosted by Equinox Open Library Initiative. With many local attendees, 28 people attended over the course of November 5th - 7th, a record attendance.

Quick numbers: eleven commits to master, thirteen patches submitted, ten patches had one or more sign-offs, and nine additional bugs reviewed. However, the Hack-A-Way's real value lies in strategic planning. Angular continued to loom large. Galen Charlton and Bill Erikson did a presentation on moving forward from AngularJS to Angular. The framework's rapid development has meant a need to work out a way to handle future development and transitions.

Discussions ranged from the large (Git replacements) to the specific (new reporting views). We also experimented with using YouTube Live to share active discussions and archive them for the Evergreen community YouTube channel.

Next year we return to the Hoosier state, Indiana, for more hacking. See you there!

Digging Through Docs

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 ever-increasing features. At 848 pages, the consolidated manual for Evergreen use is not for the faint of heart! However, with a customized Google search and sections broken out for common use types, the recently re-organized Evergreen official documentation is a robust tool for training, self-education, and trouble-shooting for users of all skill levels.

DIG is constantly working to make it easier to improve the documentation. This year, DIG has moved to handling all documentation changes through GitHub, and with 180 commits this year it appears that DIG members are appreciating this change. DIG also provides a way for new contributors to get familiar with the terminology and process around adding to Evergreen and open-source software in general. Some, like Linn-Benton Community College's Jane Sandberg, have even moved from providing documentation into writing code for Evergreen itself!

Interested in learning more about DIG? Check out https://wiki.evergreenils.org/doku.php?id=evergreen-docs:dig for info on meetings and signing up for our email list. All documentation is released under a Creative Commons Attribution-ShareAlike 4.0 International (CC BY-SA 4.0) license, and is available at http://docs.evergreen-ils.org/.

Student Success



Evergreen began as a solution imagined by public libraries for public libraries but has never been exclusive to them. Throughout its history Evergreen has been used by academic and school libraries. In fact, the first code commit from a developer outside the original development team was from an academic library and to

this day academics continue to be active in every area of the Evergreen community. In 2018 a Student Success Working Group formed to focus on those issues experienced by academic and school libraries. Meeting quarterly, the group has been off to a strong start in it's first year of existence.

Each quarter the self-selected group discusses issues that impact its work, shares solutions, and discusses long-term needs that heavily impact educational institutions. Already their contributions have helped update the Booking component of Evergreen and bring it refreshed into Angular. You can find out more about the Student Success Group at the community wiki:

https://wiki.evergreen-ils.org/doku.php?id=student_success_working_group

Who Uses Evergreen?



From consortia with hundreds of branches and millions of annual circulations to stand-alone rural libraries with fewer than 20,000 patrons.

Libraries all over the world.

With support for right-to-left display and customizable translations, if Evergreen doesn't already speak your language - it can.



Us. Catalogers. Circulators. Patrons. Developers. Administrators. Everyone. We are Evergreen.

Libraries of all kinds.

With acquisitions, serials, booking, authorities, SIP2, LDAP support, a web-based staff client, and even an API for e-book services academics, schools, public libraries, and research institutions all use Evergreen.

Spotlight on the SPARK in Pennsylvania

SPARK

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Consortium



Established in 2011 with the goal to make a shared, open source ILS available to Pennsylvania libraries, Pennsylvania Integrated Library System (PaILS) now stands at 144 member libraries using our SPARK Evergreen installation. We serve larger multi-location library systems, county collaboratives, and single location libraries. This points

to an important component of what we do: PaILS helps to ensure equitable access to library resources in Pennsylvania by providing libraries--regardless of size or budget – with a stable, robust, collaborative, open source ILS.

Public Libraries PaILS and its members understand that we are part of a community and, as with any community, we must do our part. We have been happy to leverage the power of open source by sponsoring or co-sponsoring several major development projects.

For example, libraries in snowy Pennsylvania needed a way to take care of due dates on snow days, and so we sponsored the Emergency Closings Handler feature that is in Evergreen 3.2. Bug fixes were another area of focus -- PalLS funded a bugfix project in 2018 to fix 5 separate Evergreen bugs. Another project that PalLS initiated and funded made major improvements to the Patron Acquisitions Request Feature and included rewriting that interface for the web client. There will be more PalLS-sponsored features to come in 2019!



The important thing to remember in open source is there is no "they" to blame if something doesn't work right. It is up to us. We are proud to contribute resources and personnel to conference planning, programs, and the Evergreen Oversight Board, and PaILS is honored to be hosting the 2019 Evergreen International Conference at Valley Forge. 2019 brings change for PaILS as Scott Thomas moved on to lead a member library and we welcomed a new Executive Director, Carrie Cleary. The future is bright for SPARK libraries and Evergreen with PaILS. Welcome!

Lisa Rives Collens, PalLS Board President

Patron-Focused Circulation

Auto Renewals was born out of a desire to give more to the patron – we wanted a feature that provides service without any hurdles. An administrator can set the maximum number of auto renewals in Circulation Duration Rules, set up the action trigger, and you are all set. Patrons' items are renewed automatically and patrons are notified of the renewal success via email. Patrons are also notified if there is a block preventing renewal. There are no requirements for opting in and no need for a patron to call, email, or walk in to make it happen. Auto Renewals was

production.

released in 3.2, and we look forward to utilizing the feature in A long-desired feature in Evergreen has been to allow a hold pickup by a person other than the patron. With Alternate Patron Hold Pickup this process has been greatly simplified. If a patron has a hold available, another patron (family member, helper, etc.) can pick it up and



check it out to their own account. The staff member performing the checkout will see an alert letting them know that this is lane Patron's hold, and asking if they want to proceed. A checkbox will indicate if the original hold request is to be cancelled, or retained. The initial value of this checkbox is controlled by a new setting. Thanks to CW MARS for this great new feature!

Credits

Thank you to everyone who worked on the Annual Report this year.

Altoona, Bedford, and Bethlehem Libraries (photos, "Spotlight on SPARK") Andrea Buntz Neiman (editor, proofreader, writer) **Rogan Hamby** (editor, layout, photos, writer) Lucien Kress (proofreader) **Crystal Martin** (selfie during keynote, front collage) Katie Greenleaf Martin (writer, "Digging Through Docs") Lisa Rives Collens (writer, "Spotlight on SPARK") John Rucker (proofreader) Mike Rylander (writer, "Looking Back on 2018") Geoff Sams (writer, Auto Renewals feature on "Patron-Focused Circulation") Jane Sandberg (proofreader)

Meg Stroup (photo and tweet on front collage)

We also want to recognize those who served on the Oversight Board in 2018.

Jason Boyer, Holly Brennan, Garry Collum Ron Gagnon, Anna Goben, Sharon Herbert, Terran McCanna Mike Rylander, Tim Spindler, Scott Thomas, Jessica Woolford

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Current and past annual reports can be found at https://evergreenils.org/aboutus/annual-reports/.



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