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The Evergreen Project, Library Software Conference

The First Year- Lynn Floyd

May 27, 2021

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The Evergreen Project, Library Software Conference: The First Year

Lynn Floyd

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[Standby for audio]

>> All right. Good morning everybody and welcome to track 2 of the last day of the conference. Again you're in track 2. And were going to be listening to Lynn Floyd, sharing her story about the first year as the systems administrator. So thank you, Lynn for coming and talking to us about that. The conference sponsors are Evergreen Community Development Initiative as a platform sponsor and thank you very much for sponsoring us.

And Mobius is also the captioning sponsor. And I do believe we will have captioning. Yes we do for track 2 and I will place a link in the chat for that. If you have any questions for Lynn, you can post them there in the chat. There's also a Q&A section so either one. I'll be monitoring both and I'll be making sure that we will be getting to your questions in the time allotted. So thanks again for coming on board with us today.

>> LYNN: So, let's get started. Let me make sure I go to the right screen. These are the things I learned. The first thing you learned is that you don't know everything. It's a brand-new system but you'll have to learn it. I mean when you go from working in a public library for 15 years, this is where I was at. While I actually set up all of the systems I knew all of the systems and how ever they work together and everything like that, now into a system and systems that someone else did all of that for you. You may know the next-- you may know Evergreen and you may know Postgres but when you enter a new system, you'll have to relearn it all from scratch. Because everything is set up different.

What system you are running and what versions you are running, what are the local policies because I learned from the state that every system had its own set of policies. Every library was just basically sharing resources, then I go to a system where everything was governed by a board. And everything had to be run through that board, other systems you had to learn statewide, because I was not just coming in as the Evergreen system administrator I was also coming in as the MIS supervisor. So all of the other systems came into my purview and some of them I had no idea how they worked and I had to learn that from scratch things like our statewide resource sharing that's different from Evergreen search which uses... Autographics, I had to think a minute.

I'm having to learn that one; that's a whole new system and a whole new way of doing things. So I've had to learn working with that system. Our statewide database system; I had to learn it. There was so much that you have to learn, and I've gone to a system where I just knew everything about our system but I didn't know anything now. So I came across the system and I made recommendations. Find your local documentation. I picked-- the first thing I had to figure out was where was the local documentation and how were things documented; what were the local policies and what were the local procedures? Wherever they are. The wikis, and how to get it set up, and get yourself-- and the other thing is access to all of the local documentation. One of the things I had to figure out is because the state library as part of a state agency of the state of Indiana, a lot of our internal policies and procedures are also based on the Indiana office of technology which is the state IT department.

And I have to learn their policies their procedures, how they worked also, not just within Evergreen but across the board. So I mean there was a lot that really needed to be focused on, on where IOT's documentation was at. And hopefully there is local documentation. Yeah. And I didn't find the documentation I was looking for. The documentation may have been there but it was not in the form I was actually looking for. So I had those issues, for me to find the local documentation I had to go through old Git logs, old helpdesk files and pull out those documentations to find out where they were and read them so I knew what the system was at the current set up. The other thing is I wanted to know how our servers were set up and everything like that. I went from a hosted environment and now I was the one actually in charge of all of this. I had to flip my brain to work in a slightly different way and then on the next slide is document everything that's the one thing I realized that because I was not looking-- I couldn't find the documentation I wanted it in the way I wanted it.

It was there but it was in bits and pieces and files in pieces everywhere. I wanted to go through and actually make sure my documentation was there. I've not gone through everything yet because everything else has happened this year. I wanted to make the document, what changes were made, to which servers, how they would change and how they would often change especially when it comes to the policy changes with Evergreen when the libraries went fine free, when libraries went to auto renewal, things of that nature. When we added certain modifiers and we added patron profiles and we changed patron profiles, a lot of this is still documentation that I want to put in place so that anybody that came after me, the documentation is there.

Some of this is not documented in one place, but it's here and there, yonder. I wanted a consistent documentation about everything with Evergreen and that's one of the things I'm going to work on in the next year; get this documentation down. Anytime we make a change to Evergreen, whether it's something in the foreground or in the background or anything I want, that document, even if it is just documented in the code saying that this change was made, so-and-so and I want that documented outside of the code for now. That way if anybody comes behind me they know "Oh, This affected this, so these two pieces need to be updated also at the same time." And we ran into this in our last update where things were changed but then documentation was made, except for in Git log, in the code, and we had to go back and look for those changes in Git log and code so that we knew what changes needed to be made so they could work the way they were supposed to be working, because there's was no set documentation, like these are the local customization to Evergreen moving forward, that were just put in the Git log and sometimes because there was some documentation, the documentation I was looking for was not there. I had to go back and re-create some of this documentation and it's all by hand, scratch on a piece of paper right now

So that's the biggest thing I want to tell everybody. And yes this comes from me being in the documentation interest groups as well because documentation to me is a big thing. I am a very big proponent of documented code, documenting processes, documenting procedures, documenting everything, because if I'm hit by a bus tomorrow, or okay-- a really good example, my plane tomorrow night crashes, then I don't have to worry about whether this code is documented or how anybody coming in behind me can actually work on this process. Those document changes are going to be there. Now I'm a big proponent of documentation and anyone who knows me for a long time knows that. The next suggestion, the next thing I've learned is always ask for help. It's okay to ask for help.

Because I had never done a major Server update with our last upgrade because not only in our last upgrade we went from 3.2-3.4.4.. But for us to go to 3.4.4 we actually had to do several other upgrades in the background we had to upgrade our OS on our servers, they were sitting on Ubuntu 1404 I had to upgrade them to 1804, before I could even do the actual Evergreen update I had to upgrade our Ubuntu 1404. And then we were running and our server 3.0 and needed to upgraded to 3.2 and I actually had to do an upgrade on Evergreen. Now moving forward, I will never do that again, but in order for me to actually get that done, I had to ask for help. We had to actually have an outside consultant come in and actually help me do the work and get every thing up and running in a timely manner. There were some things I had to question and I had asked for some help. We needed to get NCIP and SIP running. After everything was up and running, NCIP and SIP was acting funny so I had to ask for help, so knowing that, I've been in this community since 2009 I knew who to go to ask for help. So I sent a quick message to Jason Sievers and said, "I know you wrote the code for this, why isn't it working?" And he gave me the exact things I needed to know to get it up and running and once I got the information from him, I got it up and running so asking for Help is huge.

My staff actually, I actually have a nice staff most of you from IT know that Bob Jackson is my database administration and he actually runs 90% of the actual database administration for Evergreen Indiana. He has been so helpful in this last year because I was able to ask him for help because I had some pieces missing and my ability of PostgreSQL; there was a chunk of that, I could use SQL and I can use it using PT admin but we don't have PT admin installed so it was straight Postgres command line so I had to go back and look and say, "Okay, how do I use this writing in the command line not PG admin" because with PG admin I can pick and choose. But I had to think about how I was going to learn, but I had Bob there that I could ask, a developer that worked there with me but other statewide resources and projects that we have for the other state wide programs that do a lot of help with programs when I got stuck on line I said I didn't understand, I would ask Jeremy and he would say, "oh just do this." And I would say, okay. I knew enough about Linux but not enough. I taught myself about BASH. Ask for help if you need help; your IRC is there for help.

The listservs are there for help, just the people in the community, if you know them and I know a lot of them, so I can ask them for help, I can ask for help when I needed it. The other thing is you learn from your mistakes. And I've made a lot of them this past year. [Light Chuckle] I took down all of Evergreen one time because I took one server off-line and I realized that um, we are hosted at a data center and I was at the data center-- and there was something else because I was actually going through the stuff we were storing in the data service and I was going through the servers and you would be surprised at how dusty our service centers are and I accidentally hit the power button on one and I took it down. I didn't realize it until I started getting the notifications on my phone "oh crap, turn that one back on." Just stupid mistakes like that; that are always interesting to learn from, because those are the mistakes you learn the most from.

Another one is that we were redoing our serial's logins to make it more efficient for our libraries to use the serials module, and how the different serials modules-- and to make it much more easier for our staff to use-- I mean the public to use the serial modules and we had a couple that wanted to use them and so we said okay we will set up the profile and when I set up the profiles for the serials modules, I didn't actually grant them to use of doing issuances which is actually MARCing the, the serial actually being received, I left that provision totally off so they couldn't even receive an issue of a serial. There was an easy fix I went in and added that; everyone logged out and log back in and everyone was happy but there's also little mistakes like that.

I can sit here and tell you the mistakes I've learned over the past year but there are so many of them. But you learn so much from your mistakes. And the other thing, don't even think I could fit in 45 minutes but you can gain the knowledge that you need to know. There's a lot I didn't know going in and I had to go back and teach myself a lot of it. And as an unexpected year this has been, I had to learn and my learning curve was huge and it had to stay that way. I took classes, on Lydia.com, Udemy, and Corsica. And I want to spend a few hours just so I can learn it to get the basics I needed to know and then I would go back and learn more. I always go back and learn more as I went. And it's the way-- I mean every day I learn something new in this job, because if you don't, you have to get better and better. And I've had a really good conference this year because there's been differences in things that I've not-- I've had a different way of looking at this conference this year than I've had in the past.

In the past it was like "I can't mess with this so why learn this but now is like, I need to learn about this." So I pay attention to things a little bit more. This is my last slide. Expect the unexpected. This past year, (Sigh) as most of you know has been really unexpected. Five months after I was hired I had to shut down every single resource sharing for every single library and we had to close 95% of our libraries for a while. So there was a lot of unexpected-- I mean as we were trying to shut down libraries and turn off the resource sharing... One of the things I had to do also is try to get all of the Indiana state library employees able to work from home. So they could-- so all the state library employees could go and work from home for six months. So I mean there was a lot of unexpected turns in this past six months, or past year, year and 1/2, that I don't think in a normal year you would have had. My boss has changed jobs three times actually. I've had three different, yeah three different bosses in the last six months or year. So yeah, there's that also.

There's so much that was unexpected in the way things happened that it's always interesting to see how things affect how you-- but there's a couple of things unexpected things that happened, I was actually able to take some of those courses from Udemy, and LinkedIn because libraries were shut down, and yes things still had to happen and main system sand maintain but I could actually sit down and actually learn some of these courses.

So it's been a very interesting year. (Sigh) but as for everything, the thing I want to point out is even if- for everybody- it's to document everything. I keep harping on this, I'm bad about it myself and it is just more for me, harping on it. Ideally, how you organize your documentation and what that form would you use... Um, right now we use wiki for our internal documentation, which is great. A lot of my documentation is just in Notepad, notes. Text notes to myself that I am actually going to end up making formal documentation and store it in a formal location of some sort. A lot of- actually, I would love to have all of our Evergreen documentation together in some platform that we all have access to. Whether it be the wiki or um, Google Docs, I know we are looking at looking (?) Antara (?), so that all of the libraries will be able to look at public documents which is great because that way we can also have the staff look at AsciiDoc.

Right now, I'm just trying to get every thing documented somewhere, so that when we actually really looking at compiling this documentation into formal documents, we have things wrote down that we can compile. Do you recommend... (Referring to chat box) Probably working in both the state model an individual library for individual policies. I can see both sides of it. I've worked in Georgia Pines library for years back in 1999-2004, before they actually started in Evergreen. Yeah and it's really the internal question. I see pluses and minuses when I worked for Anderson County library with South Carolina- SC lens- we did the individual libraries and policies and I could see, because SC lens was a smaller consortium, there was a lot where you could view the policies but with Evergreen Indiana it's a huge consortium, we have some flexibilities in the policy with low, medium or high or short, medium long the different funds, and links that you could do. Building was circulation policies.

Because you can do some of the individual-- I think especially manage circulation policies makes better sense because especially when you're dealing with a number of libraries because I would hate to manage 126 different individual library policies with SC lens there was only 10 systems, much easier to manage. So it really depends on a lot of things. Like I would definitely go individual policies if it was a small consortium, where a much larger consortium you've got to have a centrally managed one.

Yes each patron should pay for their own policies... Yeah, sometimes the patrons want their own policies but that's when there certain aspects especially with Evergreen that makes it much more user-friendly. There are some tweaks with Evergreen, if you know how to use it you can sort of have your own policies. You just have to make-- you just have to know how to make the different tweaks and things giving them that. Yeah... 57 member library systems, I would definitely say that was definitely one where you want to start adding a state model versus individual libraries.

Now we do have libraries that are fine free within Evergreen Indiana so we do have to manage those policies separately- well they have their own set of policies in the systems because we don't charge fines on those accounts but when a patron-- one of the things that we do when a library does go fine free it's across the board. They are fine free across the board. Yeah... Patrons travel a lot because they do here in Indiana. They travel a whole lot. And that's one thing that I know working with originally with Georgia Pines when it was set up they did it that way because they were usually using software where you had to do it but one of the thought processes behind the statewide policy was it was consistent from library A the library B. But I've seen policies where there's good sides and bad sides you'd be surprised how much South Carolina got people confused yet you have people are really into documentation. One of the things that I've run into is that there is several of my staff that love to document everything and they gave me biweekly reports every thing they've done in the last two weeks which is great and it allows me-- and even individuals that don't have a whole lot interaction with them, so this is nice that I can get a report to see what they've done in the last two weeks and I can say "yay, they've done their job." But especially now since they all work from home and things like that it becomes much more handier.

But yeah there's a lot I've learned in the last year. These are just some of the highlights that I ran across and ran through my brain and when I propose this a lot more went through my brain and I wrote it down at that point but I mean learning-- everything from learning how, the interpersonal skills that you've learned, the new people that work for you, the people you work for the other people in the office I mean you've got to remember I moved halfway across the US too. During this time, and then the world shutdown. Sad. But you had to-- I mean going into a new environment, it scared the bejesus out of me that I actually have control over this is like they trust me to handle all of this? But you learn to do it. We actually had in this last year not only have we had changes within Evergreen we've migrated and updated all of the Evergreen servers we found out we had problems with the data center. We had to do some changes in the datacenter. We're fixing to actually upgrade a couple of servers next month, if we get them in, we've ordered two new servers to go in, we've done four different migrations in the last year and half. A couple of them catalogued in and a couple we migrated in. Cataloging in is interesting because their system could not be migrated in at all. It was an access database.

So there was no way to actually get that data into the system. But we could pull that system in and they could catalog in and they started fresh on everything. That was always interesting. Yeah making that transition from support the systems I was in was scary. It's still scary there are days I don't think this is what I should be doing, but you have to take those days and slide with them. Ah, the newsletter. Yeah. We do send a weekly, roughly weekly updates through the consortium. Keith and Catherine Berger actually commented on this, I've not been reading through the chat. All have to go back through. And we do it weekly just because there's always something you can include.

I'm reading some of them. (?) Said how can libraries organize organizations and make documentation more part of their culture and everyday work? That's a good question, Jane, it is one of my goals, to make documentation more of an every day thing that I do. It's either (A) document a new piece of code in Evergreen or document something we use for Evergreen Indiana or document something that we use for the MIS document a recent thing that we started documenting is computer software how that computer management software interacts with Evergreen and what the settings of the different computer database that the different computer pieces need. Because I know how this particular software and several other staff knows about different software but there's no consistently wrote down that this software needs these pieces of information and this is the information that they need, because there was no way um, no one ever thought about writing it down. When you have more than one or two people on a helpdesk, I mean having this documentation readily available allows anybody to answer those helpdesk questions.

Another InVision is PC reservation and LPT is one software I know fairly well because I've used it for 15 years and I've upgraded that software. I don't know how many times. But that doesn't mean that anyone else who needs help and asked this question won't have that information so that's definitely a piece of information that we have recently started documentation on. When PC management software like overdrive, hoopla, or any software, anybody that uses SIP or NCIP, any of those external pieces we are starting to document what is needed for these sources. That way anybody who can get a helpdesk ticket, can actually apply for-- because I have six of us who actually manage our helpdesk, everything from-- our helpdesk also includes everything from local hardware, desktop software support to Evergreen Indiana support to patrons coming in- [...COUGHING...] Coming in from weird spots of Indiana. I'm trying to think of a weird town in Indiana... Emailing us saying they can't get into our statewide databases. All of that is filtered through the same helpdesk to have certain members that answer certain questions but I wanted a little bit more. One of the long-term goals is to get most of the staff more able to answer some of these other questions and not think twice about it, in my expecting too much from these staff? No. Because if Lisa is out, someone else needs to be able to answer these questions. Lisa is the one that deals with our inspired databases. She's the one that usually takes care of it because usually there are IP conflicts.

But yeah. Wikis are easier, and it may-- we had an internal wiki, was it wiki? Well there a several different ways we have looked at-- we have blogged that. Yeah. I'm just reading the... Yeah, we do place our older news, we need to make a note, Keith to update the new ones. But there's a lot that I have changed in the last year. Yeah the pandemic, three weeks-- I was the last one to leave the office in the pandemic. Everyone else went home and I was the last one to leave. Building maintenance even left before I left because I was trying to get equipment for people. Any other questions? This is probably not what you were expecting but this is what I've learned in the first year. Always document everything and ask for help. Ask for help.

>> GINA: If anyone else has any other questions you can put them in the chat. We have about 10 minutes left and feel free to use the time as you need. But in any case I wanted to thank you for talking about your first year of system admin.

>> LYNN: It's been an interesting year.

>> GINA: A lot of thanks from everybody. Thank you so much for coming to this session. We do have one coming up on track 2 for 12:00 that's going to be the discussion roundtable, and we also have exhibitors at the Expo, so check those out or if you want to continue the conversation in one of the open discussion groups you're welcome to do so and thank you again, Lynn. One last thing is that this will be recorded so we will be posting it in post conference.

>> LYNN: You're welcome.

[End of session]