Conifer

The Now and the Near-Now

Dan Scott, Systems Librarian

Access 2008

October 3, 2008
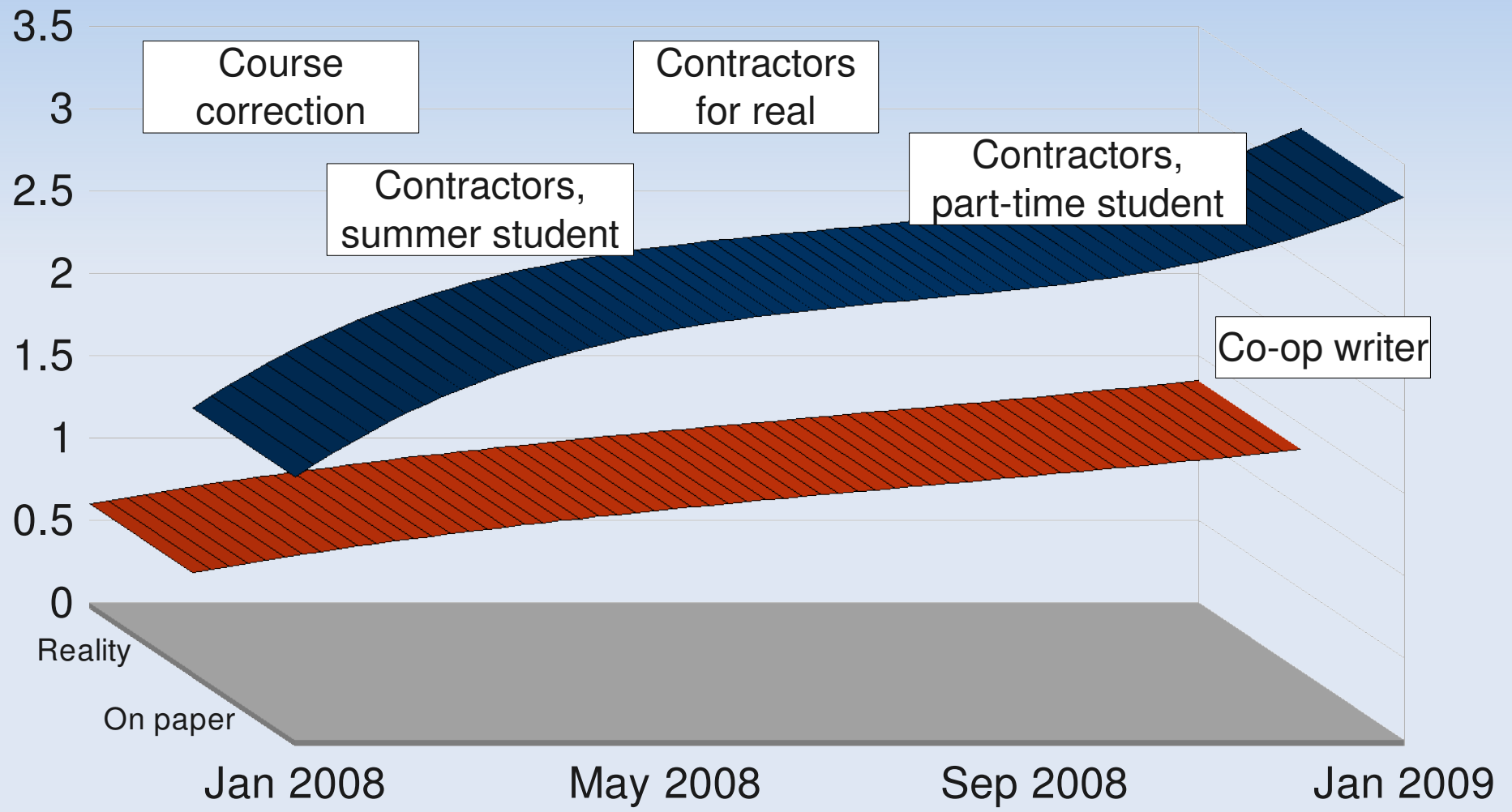
Rollercoasters

- Chasing funding--
- Contractors++
- Bureaucracy--
- Students++
- Leisure_time--
- UPEI++
- Contractors++
- Partners++
- Contractors++
- Windsor_strike--
- Access_2008++
- dbs_baby_2.0++

Human resources?

Pilot hardware

App servers:
16 GB RAM
8 cores
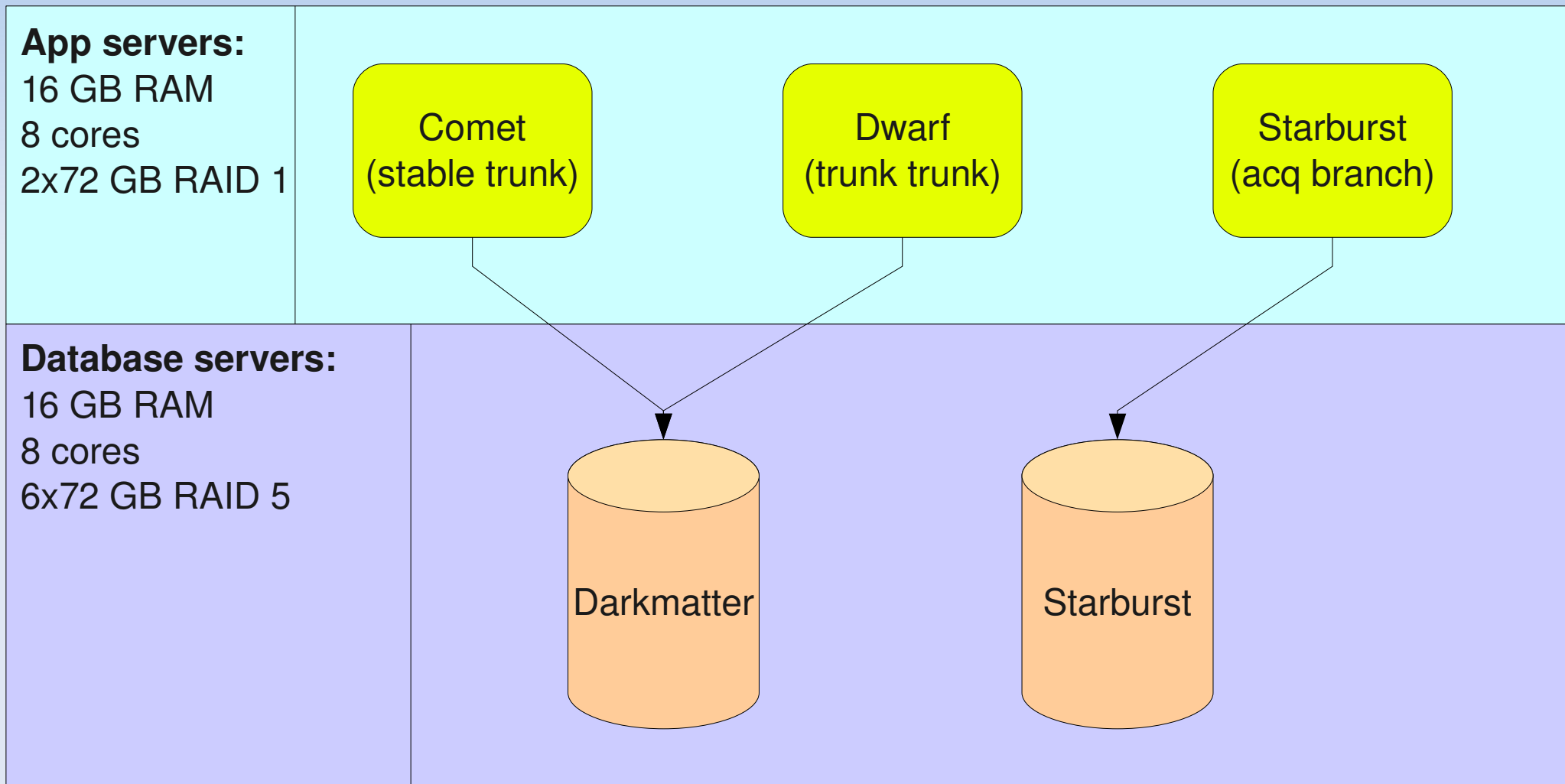2x72 GB RAID 1

Comet
(stable trunk)

Dwarf
(trunk trunk)

Starburst
(acq branch)

Database servers:
16 GB RAM
8 cores
6x72 GB RAID 5

Darkmatter

Starburst

Projected costs to go live

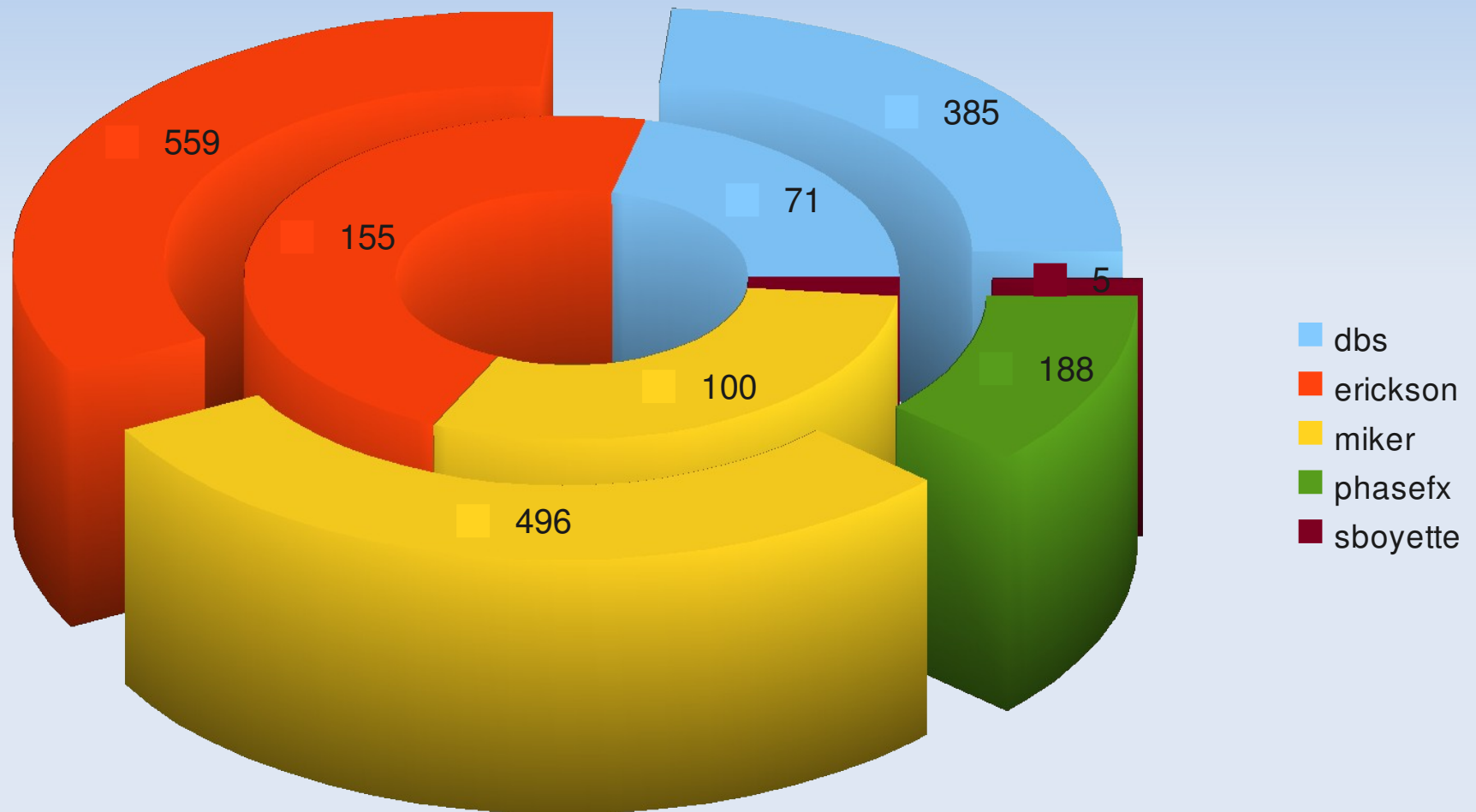|	
Conifer personnel	$75,000.00
Contractors	$32,000.00
Student developer	$10,000.00
Co-op tech writer	$12,000.00
Travel	$10,000.00
Servers	$60,000.00
Migration	*Redacted*
De-duping	*Redacted*
1st year support	*Redacted*
Training	*Redacted*
Total	$199,000.00 (+ services)

Funding models

- Various pots of existing funds for development
    - Charge back for Art's KO service
    - Existing ILS and hardware budgets
    - "Percentage" model for existing employees
- Tried for some external funding but came away disappointed
- Cost-sharing for support & migration TBD

Symbiosis

Equinox + Conifer

Are we making a difference?

# of commits to Evergreen (outer ring) and OpenSRF repositories since September 2007

Are we there yet?

- Six months until April 2009

  - April - because we don't really want to be changing much code in our final month

  - Parkinson's law:

    - *Work expands so as to fill the time available for its completion*

  - We've been doing a lot of work that might be considered off the critical path – but extremely important long term

Road maps

Evergreen 1.4 road map

- September 2008 (give or take a few days)
    - ✔ User-friendly administration interface ("Conify")
    - ✗ Easier administration of circulation rules
    - ✔ Multiple Z39.50 targets
    - ✔ SRU and Z39.50 servers
    - ✔ Internationalization support
    - ✔ Reminder notices
    - ✔ MARC importer / exporter ("Vandelay")*
    - ✗ Credit card payment for fines*

Evergreen 2.0 road map

- Winter 2008/2009
  - Acquisitions
    - Manual ordering
    - MARC order loading
    - EDI
  - Serials
    - Hardcore MFHD
    - Generated and textual summaries
    - Predictions, check-in, claiming
  - Academic reserves

Project Conifer road map

- October 2008 and forever after:
  - Testing, testing, testing
    - Update our test servers and migrate data for bibs, patrons, acquisitions, etc
    - Usability – set up cross-university groups to identify required changes for our go-live date
    - Stress – simulate expected peak loads
  - Develop, develop, develop
  - Document, document, document
  - Iterate, iterate, iterate

Project Conifer road map (2)

- February/March 2009:

  - Set up parallel systems:

    - Holdings

    - Acquisitions

    - Serials

    - Reserves

    - Circulation rules

  - Test, test, test

Project Conifer road map (3)

- May 2009:
    - Freeze all acquisitions activity
    - Migrate
- Easy!

Should <u>you</u> do this?

- Where "this" = commit yourself to migrating to a system with parts that have not yet been built

  - If you have to migrate anyway

  - If you can dedicate required resources to the project from the start

  - If you can accept some risk for future ROI

- Or, if you wait for a bit, you can watch and see what happens to Conifer

Whither Conifer?

- We've been fielding requests to join Conifer since shortly after the project launched
  - Colleges, hospitals, and other universities
  - Scale of economy – once we reach a critical mass, we will be able to justify supporting ourselves
  - Public libraries? School libraries?
  - Knowledge Ontario?

Some anticipated questions

- Does this mean shared bibliographic records? **Yes. (Our cataloguers need to talk!)**

- But our electronic resources will differ... **URLs will be equivalent to copies in 2.0.**

- What about visibility of financial data? **Evergreen has extremely granular permissions.**

- What about patron data? **We'll be FIPPA-compliant.**

- Will this replace RACER? **No! We just want to enable easy, on-site direct borrowing between Conifer institutions.**

More anticipated questions

- How we will get support for Conifer?

  - We will sign migration and support contracts with Equinox

  - But we will have at least one point of contact to coordinate support

    - Probably one point person per partner institution
    - Eventually, probably a centralized position or positions

OLE OLE, OLE OLE

- Does OLE's classification of Evergreen as a project that primarily addresses print problems concern us?
  - No; we <u>do</u> need something to deal with print.
  - We can build services for managing electronic resources on the same solid base.
    - Maybe OLE will build on Evergreen
    - Or we can just cadge any good ideas that come out of the effort

Who's doing the work?

It takes a village to build an ILS...

"Real" Conifer personnel

- John Fink, McMaster
- Cathy Maskel, Windsor
- Art Rhyno, Windsor
- Dan Scott, Laurentian
- Karen Foster, Anne Pottier, Grace Uy+++
- Craig Ricciuto, Laurentian (student)
- Michael Klein, Boston (contractor)
- Graham Fawcett, Windsor (contractor)

Partners

- University of Guelph server team

- Equinox Software, Incorporated:

  - Bill Erickson

  - Mike Rylander

  - Jason Etheridge

  - David Fiander, Western librarian by day, Equinox contractor by night

  - Kevin Beswick, Equinox summer of code student (Laurentian)

Evergreen community

- Jason Zou
- Karen Collier
- Aaron Joyner
- Brandon Uhlmann
- Scott McKellar
- Niles Ingalls
- Dan Wells
- Frances McNamara

Base infrastructure providers

- Henk-Jan Ebbers (BOTS / EDI)

- Ed Summers (MARC::*)

- Mozilla Foundation

- Dojo Foundation

- Apache Software Foundation

- Perl Foundation

- Python Software Foundation

- ... ... !!!