

Evergreen in Ontario

**The challenge (and successes) of
migrating academic libraries to a
FLOSS library system**

Dan Scott, Laurentian University

October 29, 2009

My relationship to Evergreen

- **Georgia PINES funded the development of a free software library system – Evergreen – to replace their failing and expensive proprietary system**
- **In September 2006, they went live. And succeeded.**
- **I was currently running the same failing and expensive proprietary system and despairing**
- **Evergreen gave me hope for the library world**

(and it had a snappy, modern Web interface!)

Droolworthy in 2006

EVERGREEN™
Laurentian University

Text: [Larger](#) | [Smaller](#) | Language:

free software Search Keyword All Formats University Libraries

Limit to Available Sort Results by Relevance

Results 1 - 10 of about 59 (page 1 of 6) Start « »

		Available copies / Total copies
		University Libraries Everywhere
	After the software wars Curtis, Keith. c2009 Lulu.com print 282 p. : ill.	1 / 1 1 / 1
Browse in Google Books Search		
	The open source alternative : understanding risks and leveraging ... Meeker, Heather J. c2008 Wiley & Sons print xi, 285 p. : ill., forms ; 24 cm.	1 / 1 1 / 1
Browse in Google Books Search		
	The laboratory computer : a practical guide for physiologists and... Dempster, John c2001 Academic Press electronic electronic resource remote vii, 354 p. :	1 / 1 1 / 1

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 - Computer software
 - Copyright
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 - Computer programs
 - Computer software industry
 - Computers
 - Electrophysiology
- Relevant Authors

Place Hold

About Conifer...

- **July 2007. A smoky academic meeting room. Several library directors from prominent Ontario universities – McMaster, Windsor, and Laurentian – concoct a fiendish plan to jointly adapt and adopt Evergreen as a consortial academic library system for Ontario.**
- **This scheme was dubbed “Project Conifer” - the academic Evergreen.**

Evergreen and Conifer ca. 2007

Got it	Need it
Cataloging	Acquisitions
Circulation	Reserves
Search interface	Serials
Reports	

Cautionary tales (#1)

**If you want to get things done, you need to
commit resources to the tasks**

Cautionary tales (#2)

Giving your primary developer the additional role of project manager, on top of full-time librarianship responsibilities, might not give you the results you desire

Evergreen and Conifer: ca. 2008

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Circulation	Reserves
Search interface	Serials
Reports	

How academics learn

Evergreen and Conifer: ca. 2009

Live as of May 2009!

24 libraries

3 universities, 1 medical school

3 hospital libraries

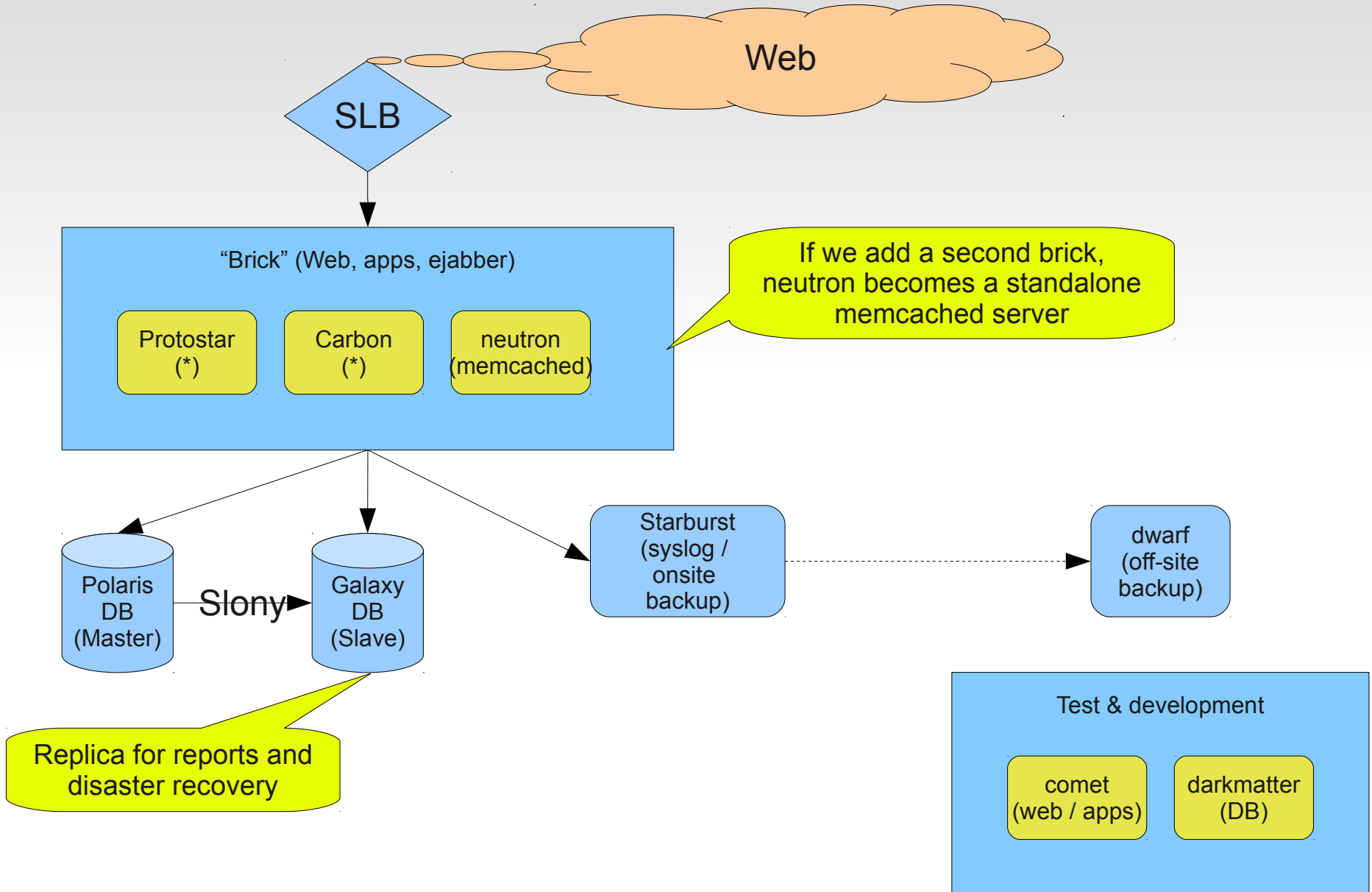
3 mining libraries

2 million bib records

2.5 million copies

40,000 users

Conifer hardware



Cautionary tales (#3)

**Nobody likes a prenuptial agreement... until things
get messy**

Cautionary tales (#4)

Free software is never *gratis*, and not necessarily cheap.

Cautionary tales (#5)

Budgets change – and they don't often grow.

Your plans may have to change accordingly.

Evergreen and Conifer: ca. 2009

Got it	Need it
Cataloging	Acquisitions*
Circulation	Reserves**
Search interface	
Reports	
Serials	

* / ** But we're getting close!

Reservations about reserves

Cautionary tales (#6)

**Loosely coupled means, well, loosely coupled,
and that's not always good**

What hath Conifer wrought


- **Internationalization support**
- **Migration scripts, customized skins, discussions**
- **Localized URIs***
- **Basic serials display and editing**
- **Reserves module****
- **Lots of input on how acquisitions works in Canadian academic institutions**
- **Z39.50 server maturity*****
- **Early testing (and fixing) of the 1.6 release**

Serials in Evergreen 1.6

J.N. Desmarais Library

Result 1 of 2 >> [End](#)

Record Summary [Place Hold](#) [More Actions...](#) ▾

Title	Adapted physical activity quarterly : APAQ.
ISSN	0736-5829
Edition	
Publisher	Champaign, IL : Human Kinetics Publishers, 1984-
Physical Description	print v : ill. ; 23 cm.
Format	 text
Subjects	Physical education and training -- Periodicals. Physical therapy -- Periodicals.
Holdings summary (DESMARAIS -- DESM-PER -- GV 445 A28 Per. -- INCOMPLETE HOLDINGS: v. [8-10] ; [1991-1993])	
Previous volumes	v.1 (1984) - v.25 (2008)
Current volume	v.26:no.1(2009:Jan.), v.26:no.2(2009:Apr.), v.26:no.3(2009:Jul.)

[Edit Holdings](#) ▾
[Edit Record](#)
[Delete Record](#)
[Add MFHD Record](#)

Serials, in full MFHD glory

Options

Stack subfields

Validate

Save MFHD

Help

MARC Record

Fixed Fields -- Record type:

Type	y	ELvl	4	Srce	d	Audn	e	Ctrl		Lang
BLvl		Form	n	Conf	4	Biog		MRec		Ctry
		Cont	g 09	GPub	0	LitF	0	Indx	3	
Desc		Ills		Fest	2	DtSt		Date1		Date2

LDR		00387cy a22001214 4500
001		38485
005		20090731172645.0
008		030828 eng 090423
852		\$b DESMARAIS \$c DESM-PER \$h GV 445 A28 Per. \$z INCOMPLETE HOLDI
853	2	\$8 1 \$a v. \$b no. \$u 4 \$v r \$i (year) \$j (month)
866		\$a v.1 (1984) - v.25 (2008)
863	1	\$8 1.23 \$a 26 \$b 1 \$i 2009 \$j 01
863	1	\$8 1.24 \$a 26 \$b 2 \$i 2009 \$j 04
863	1	\$8 1.25 \$a 26 \$b 3 \$i 2009 \$j 07
935		\$a a597952

Advantages of the consortial approach

- **Responsibility sharing:** three primary sites to handle system problems and collaborative development of solutions to mundane challenges
- **Cost-sharing:** hardware, hosting, and support, for a much more robust system than we previously had
- **A place to grow:** as we have grown comfortable with our own system, we are bringing new sites on board in early 2010

Challenges at the academic level

- Z39.50 server needs more granular indices
- OPAC - refined metadata display in templates
- Reporting – no default set of report templates
- Adjustment in general to user-friendly search
- Controlled process to roll out updates

Downtime

Conifer downtimes

File Edit View Insert Format Tools Form Help

99.5% uptime and climbing

9/17/2009 21:00:00

120 not 120 mins

restarted normally

Problems, features, and docs

Conifer consortial catalogue

logged in as dscott | [Logout](#) | [Preferences](#) | [Help/Guide](#) | [About Trac](#)

	Wiki	Timeline	Roadmap	View Tickets	New Ticket	Search	Admin
--	----------------------	--------------------------	-------------------------	-------------------------------------	----------------------------	------------------------	-----------------------

[Available Reports](#) | [Custom Query](#)

{1} Active Tickets (92 matches)

- List all active tickets by priority.
- Color each row based on priority.

Ticket	Summary	Component	Version	Milestone	Type	Owner	Status	Created
#280	Missing MFDH records	Cataloguing	None		defect	artunit	assigned	21/09/09
#38	Hanging Conifer: Adanced Search using exact phrase subject + search in another field	Public catalogue	None		defect	dscott	new	19/05/09
#215	Problems with the display of 856 fields in new version	Cataloguing	None		defect	dscott	new	29/07/09
#276	710-Added Entry-Corporate Name	Cataloguing	None		defect	risard	assigned	18/09/09

Canada: a nation of Evergreen early adopters

- **David Fiander, UWO (SIP & MFHD developer)**
- **BC Sitka (second live system)**
- **UPEI (first academic library)**
- **Innisfil Township, Ontario (first known self-hosted public library)**
- **Conifer (first academic library consortium)**
- **Natural Resources Canada**
- **Manitoba SPRUCE (public library consortium)**
- **Mohawk College, Hamilton, Ontario**

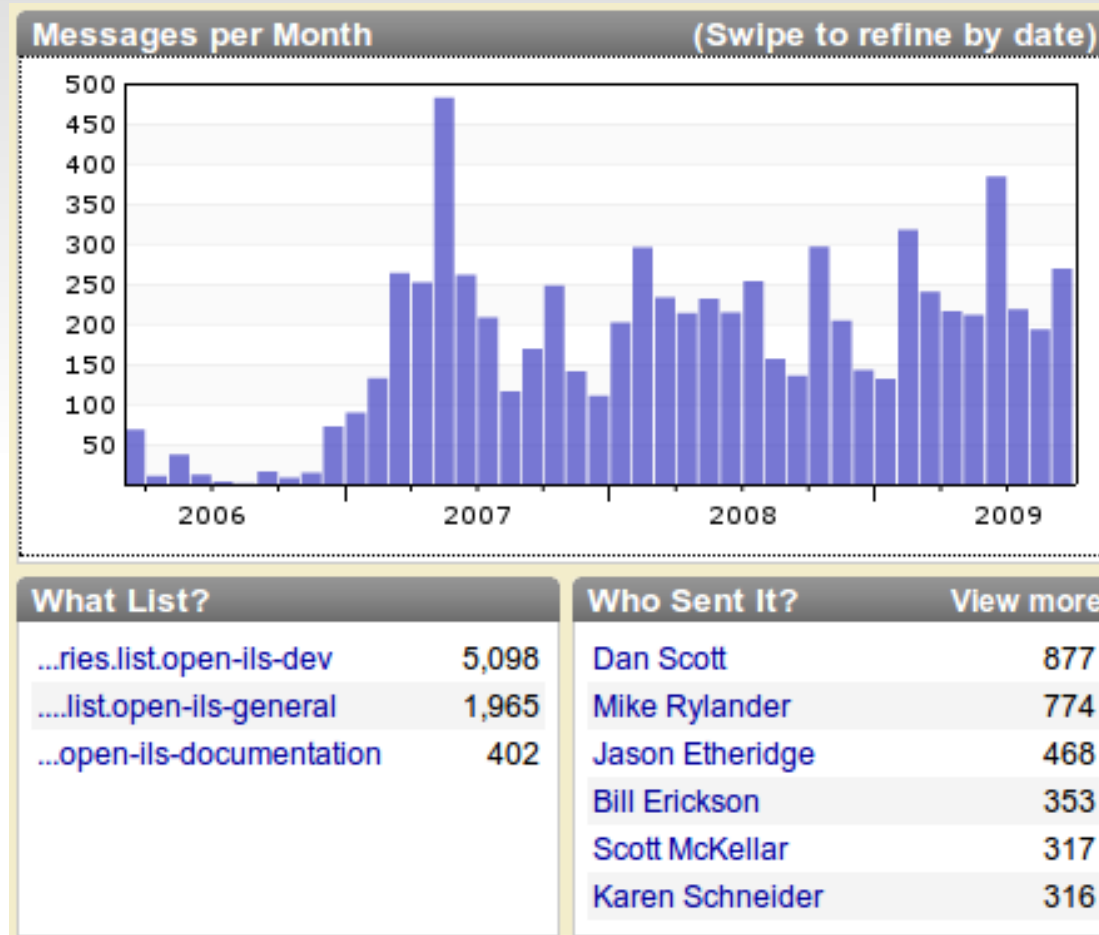
Measuring project health

- **Number of committers & affiliation**
- **Number of submitted patches**
- **Documentation**
- **Testing**
- **Community and commercial support**
- **Current releases & release history**

Good things to come

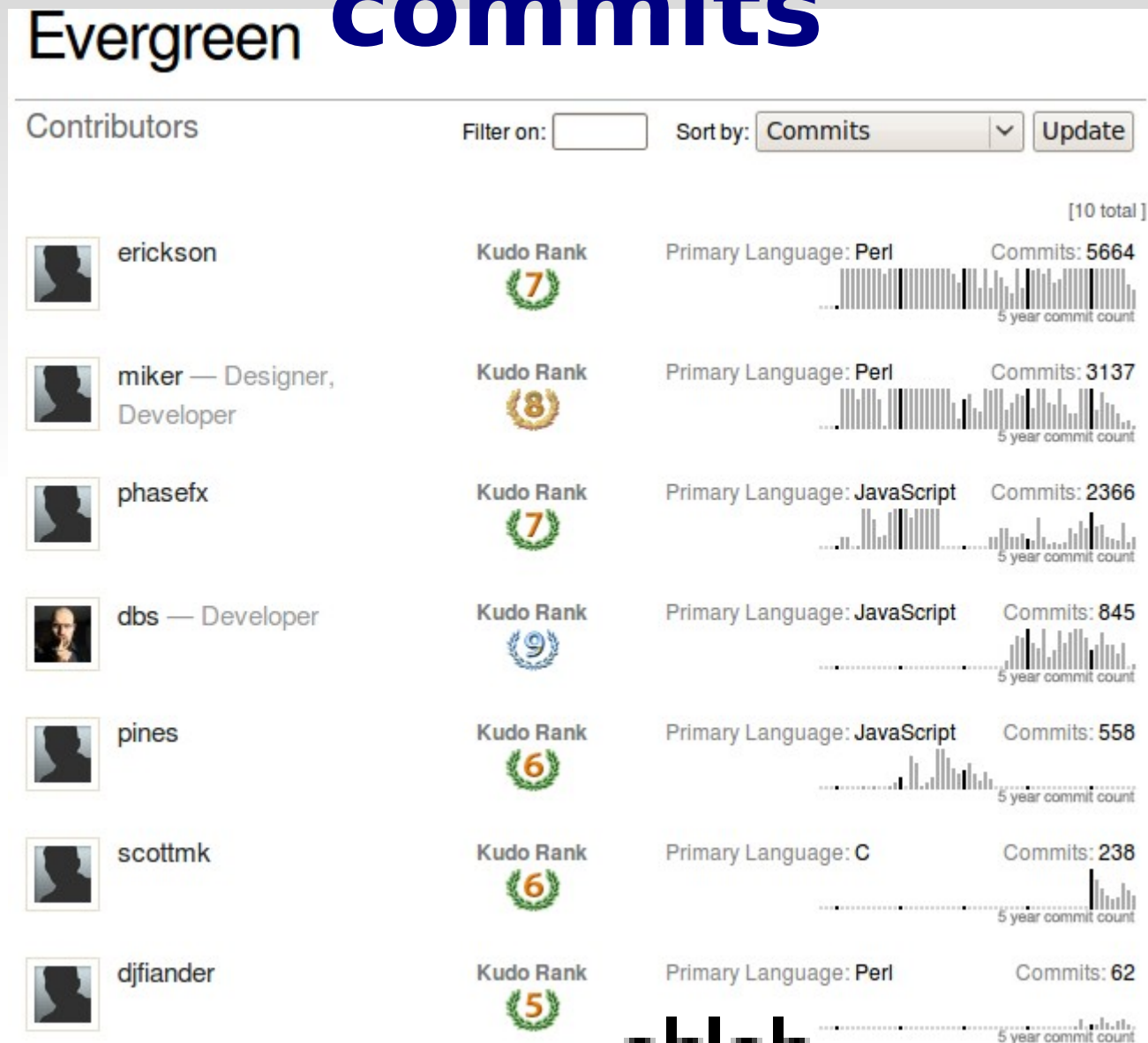
A maturing community

Measuring community: email



Statistics courtesy 

Measuring community: commits



WANTED: skilled developers!

Building an on-ramp for developers

Communicate, communicate, communicate

Rethinking the release process

Launchpad: Evergreen



Evergreen - Open ILS

Overview Branches Bugs Blueprints Translations Answers



 Dan Scott • [Log Out](#)

Registered 2009-01-28 by  jobdrb

Evergreen is a highly-scalable library system that helps library patrons find library materials, and helps libraries manage, catalog, and circulate those materials, no matter how large or complex the libraries.

This Launchpad project brings together bug reports, frequently asked questions, translations, and blueprints for future development of Evergreen.

[Home page](#) [Wiki](#) [External downloads](#)

-  [Change details](#)
-  [Subscribe to bug mail](#)

Downloads

Evergreen does not have any download files.

Get Involved

- [Report a bug](#) 
- [Ask a question](#) 
- [Help translate](#) 
- [Submit code](#) 
- [Register a blueprint](#) 

Announcements

Evergreen has no announcements.

-  [Make announcement](#)

Project information

Maintainer:

 Dan Scott


Driver:

Not yet appointed.

Uses Launchpad for:

Answers, Blueprints, Bug Tracking, Branches, and Translations.

Programming Languages:

C, Perl, JavaScript 

Licenses:

GNU GPL v2


 [RDF metadata](#)

Series and milestones

[View full history](#)

trunk



Evergreen trunk series is the current focus of development 

 [Register a series](#)

Better living through automation

I look forward to tests

MozMill for automated UI testing?

Shorter release cycles

Documentation

A solid foundation

More information

- Evergreen home: <http://evergreen-ils.org>
- Bugs, blueprints, FAQs, and translations:
<https://launchpad.net/evergreen>
- Blog aggregator: <http://planet.evergreen-ils.org>
- Mailing lists: <http://evergreen-ils.org/listserv.php>
- IRC: #evergreen on chat.freenode.net
- Laurentian catalogue: <http://laurentian.concat.ca>
- Me: <http://coffeecode.net>

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- I was currently running the same failing and expensive proprietary system and despairing
- Evergreen gave me hope for the library world

(and it had a snappy, modern Web interface!)

2

Long story short – I worked in the commercial software industry for 8 years after getting my MSt, rejoined the library world as an academic systems librarian with stars in my eyes, then ran into the ugly reality of modern ILS.

Even after taking the very expensive API training course for our ILS, I very nearly turned tail and fled – and would have, were it not for an introduction to (first) the code4lib community and (second) the emergence of the Evergreen project.

These days, I'm a core committer and getting my hands mixed up in most parts of the community... and project manager for Conifer.

Droolworthy in 2006

EVERGREEN
Laurentian University




Text: [Larger](#) | [Smaller](#) | Language:

free software Search Keyword All Formats University Libraries
Limit to Available Sort Results by Relevance

Home
Advanced Search
My Account
Log In
My Title Results

Relevant Subjects
Open source software
Computer software
Copyright
Free computer software
Computer programs
Computer software industry
Computers
Electrophysiology

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 After the software wars Curtis, Keith. c2009 Lulu.com print 282 p. : ill. Browse in Google Books Search Place Hold	1 / 1	1 / 1
 The open source alternative : understanding risks and leveraging ... Meeker, Heather J. c2008 Wiley & Sons print xi, 285 p. : ill., forms ; 24 cm. Browse in Google Books Search Place Hold	1 / 1	1 / 1
 The laboratory computer : a practical guide for physiologists and... Dempster, John c2001 Academic Press electronic electronic resource remote xvii, 254 p. :	1 / 1	1 / 1

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- **This scheme was dubbed “Project Conifer” - the academic Evergreen.**

4

“Conifer” is a high-falutin' academic term for an evergreen.

Conifer started in July 2007 when some Ontario academic libraries got together to discuss their next library systems. We had a combination of libraries needing to migrate to new hardware (with a six-figure fee to move to the same software running on the new hardware), libraries paying exorbitant fees for a system that they had mostly had to work around, and libraries on systems with no prospect for future enhancements.

At the time, the obvious choice for a consortial open source system was Evergreen. Koha at that point was still working towards 3.0 and had not demonstrated scalability that would meet our needs, whereas Evergreen had Georgia PINES. 'nuff said. Also, I had already been doing some work on

Evergreen and Conifer ca. 2007

Got it	Need it
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Reports	

Circulation, cataloging, and reports were present and accounted for.

All that we needed was acquisitions and some support for serials and reserves. Simple!

FANTASY-LAND: We committed a team of developers to get to work on fleshing out that support, in collaboration with the good folks from Equinox, and targeted a May 2008 migration to Evergreen.

REALITY: We didn't commit much at all in the way of skilled development resource to the effort. After a brief search for a project manager, that role was added to my workload.

Cautionary tales (#1)

**If you want to get things done, you need to
commit resources to the tasks**

6

Don't mistake light for heat. We had a number of people who were contributing resources to our goals on paper, but who were otherwise occupied with other tasks, or who simply didn't have the skills required to contribute base code.

A positive highlight: one of our summer students, Craig Ricciuto, put a lot of effort into the grunt work of making the staff client ready for translation.

I spent a lot of my time on setting up a test system for the purposes of hardware estimation and training. Some of that included migrating bib records and holdings.

There wasn't much development capacity available in the community to contract work out to...

Cautionary tales (#2)

Giving your primary developer the additional role of project manager, on top of full-time librarianship responsibilities, might not give you the results you desire

7

A project manager is a marvelous addition to a project! They can bring objectivity, clarity, and the ability to focus on the moving parts.

Adding that role to your one development resource, however, usually won't work out that well. Objectivity becomes a lot more challenging. One thing that developers thrive on is long periods of uninterrupted concentration. Providing status updates, preparing meeting agendas and minutes, following up on questions, and tracking budgets and resources can interfere pretty heavily with that whole coding thing.

Early on, I raised this as an issue at status meetings, but we were never able to figure out how to shift the role to someone else.

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Sound familiar? We hadn't made a huge amount of progress in a year. We had taken a detour on acquisitions and serials by trying to graft a complete ERM (OpenTaps/Open for Business) onto Evergreen, but it turned out not to be a good fit.

There was some nascent acquisitions functionality – modeled in the database, and with a Pylons-based basic Web interface that was again subsequently abandoned. There was also a reserves RFC posted to the Evergreen community.

We moved our migration target to May 2009

Click to add title

How academics learn

9

Deploy. Test test test.

Arrange for a training session for each site about 4 months before you go live.

Throw it open to your library staff to test and train with and to report problems before you go live.

Throw it open to your library users to test and train with and to report problems 2 months before you go live.

Get very little feedback.

When you go live, discover that your frontline staff didn't really take advantage of that testing and training opportunity. Uh oh. Scramble.

Evergreen and Conifer: ca. 2009

Live as of May 2009!

24 libraries

3 universities, 1 medical school

3 hospital libraries

3 mining libraries

2 million bib records

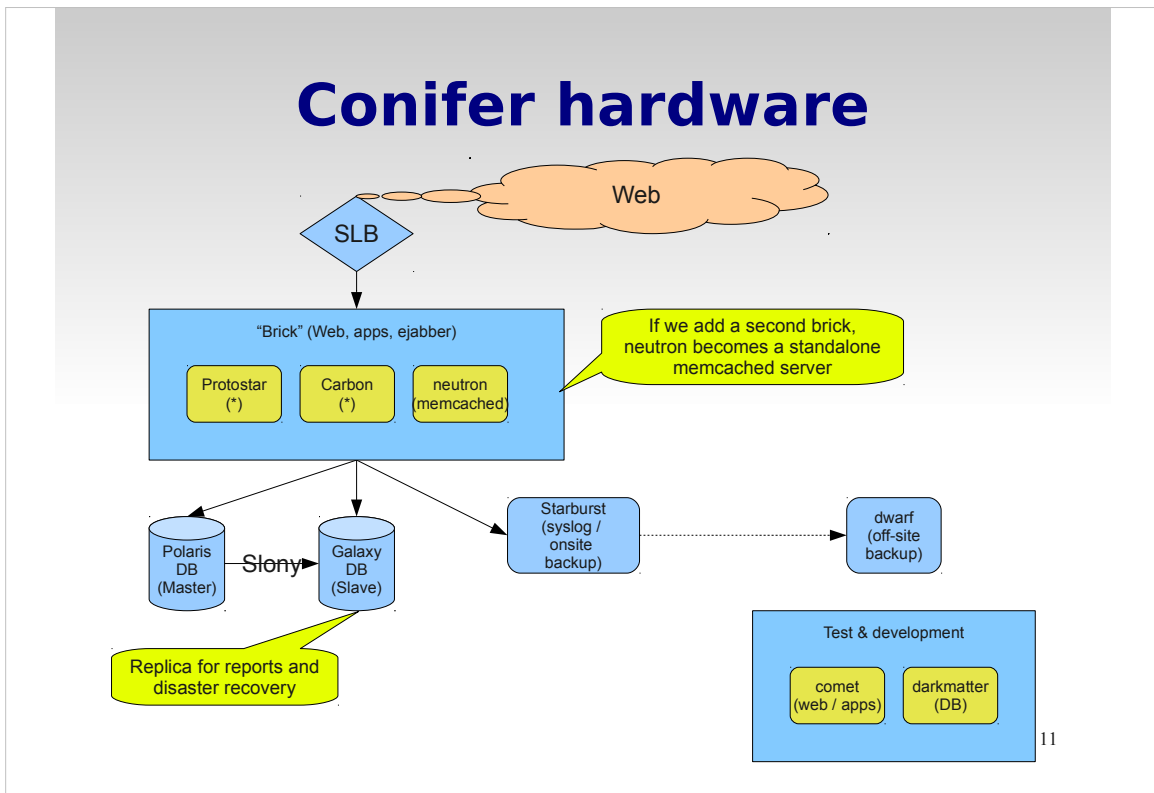
2.5 million copies

40,000 users

10

This time, we stuck to our guns and migrated in May 2009, despite a number of obstacles that came up:

- One of our largest partners decided to opt out of the project in late January, forcing the remaining smaller partners to share much more of the costs for hosting and hardware.
- Due to the recession, our budgets were slashed and we were forced to migrate our own data rather than use professional services.
- The 1.6 release, with serials and acquisitions, was not yet ready
- We had built a reserves module that was not really functional for our needs.



Most of the servers are 2x4-core Intel Xeon machines with 16 GB of RAM and a RAID 1 array of hard drives.

Polaris is a 4x4-core Intel Xeon machine with 48 GB of RAM and a RAID 10 array of hard drives.

We run Debian Lenny on all of our machines.

Cautionary tales (#3)

Nobody likes a prenuptial agreement... until things get messy

12

A handshake always seems like enough at the beginning of a relationship. If you're entering into a multi-year partnership that involves the outlay of hundreds of thousands of dollars in hardware, hosting, and support services, though, it's a really good idea to enter into a written agreement that spells out what happens if someone pulls out of the partnership.

We didn't have a written agreement. We had to scramble to make things work. We're still absorbing the costs.

Cautionary tales (#4)

Free software is never *gratis*, and not necessarily cheap.

13

It was clear to me that the main reason our largest partner dropped out was because they were surprised that hardware, professional hosting, and migration costs significant money. They had not contributed much towards development, so the delayed features that we had expected to be ready shouldn't have been a surprise either.

Cautionary tales (#5)

Budgets change – and they don't often grow.

Your plans may have to change accordingly.

14

Making the decision to migrate our own data was a hard call, for a number of reasons. Although we had not signed a contract, we had obtained a quote for professional migration and the company in question fully expected us to follow through. That's business, I guess, but it's certainly awkward when those people are your co-developers and friends.

What was more challenging was the opportunity cost. Instead of focusing on enhancements, or primary development resource was now shouldering the burden of munging, and testing, a massive amount of data.

Evergreen and Conifer: ca. 2009

Got it	Need it
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* / ** But we're getting close!

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There was some nascent acquisitions functionality – modeled in the database, and with a Pylons-based basic Web interface that was again subsequently abandoned. There was also a reserves RFC posted to the Evergreen community.

We moved our migration target to May 2009.

Click to add title

Reservations about reserves

16

I knocked out an RFC for an integrated reserves system in the summer of 2008 based on the needs of our library and those expressed on the Evergreen mailing lists. I had started by looking at ReservesDirect, an available open source reserves system, but had rejected it as being too loosely coupled.

Conifer hired a top-notch contractor to develop Syrup, our reserves system, and the plan that emerged was... to copy ReservesDirect, but to do it right. Z39.50 + SIP rather than OpenSRF calls.

Unfortunately, that means that we got a loosely coupled reserves system, that looks great, but doesn't have some of the core features that I had written up in the RFC.

Cautionary tales (#6)

Loosely coupled means, well, loosely coupled,
and that's not always good

17

The reason loose coupling isn't great with a reserves system built for a specific library system is that there aren't any standards for modifying library system data to do things like:

- Move an item from one location to another
- Change the circulation modifier for a given item

There are horrible workarounds that have been used in other systems, like checking the items out to magic users that then causes the attributes of the item to be changed. That's not good. Evergreen has nice Web services that enable you to do these things – the reserves system should use them.

Also, the interface is completely separate from the Evergreen catalogue. Yikes. So we're not using it. Something like VuFind could be tightly coupled, though, and would be nice if done right.

What hath Conifer wrought

- Internationalization support
- Migration scripts, customized skins, discussions
- Localized URIs*
- Basic serials display and editing
- Reserves module**
- Lots of input on how acquisitions works in Canadian academic institutions
- Z39.50 server maturity***
- Early testing (and fixing) of the 1.6 release

18

* Sponsored by Conifer, built by Equinox

** Built, but not currently being used

*** A snap once Mike had built an SRU server

Serials in Evergreen 1.6

J.N. Desmarais Library

Result 1 of 2 >> End

Record Summary [Place Hold](#) [More Actions...](#)

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Current volume	v.26.no.1(2009:Jan.), v.26.no.2(2009:Apr.), v.26.no.3(2009:Jul.)

[Edit Holdings](#)
[Edit Record](#)
[Delete Record](#)
[Add MFHD Record](#)

19

Those dialogue boxes on the bottom right only show up in the staff client, naturally. But the holdings display comes straight from the corresponding MFHD record.

Note that Windsor has taken a different route, and has opted to maintain all of their print serials holdings in their OpenURL resolver – so users search one interface for one consistent set of serial holdings (whether electronic or print).

Serials, in full MFHD glory

Options

Stack subfields

MARC Record

Fixed Fields -- Record type:

Type	y	ELvl	4	Src	d	Audn	e	Ctrl		Lang
BLvl		Form	n	Conf	4	Biog		MRec		Ctry
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Desc		Ills		Fest	2	DtSt		Date1		Date2

```

LDR|      |00387cy a22001214 4500
001|      |38485
005|      |20090731172645.0
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863| 1    |$1 1.24 $a 26 $b 2 $i 2009 $j 04
863| 1    |$1 1.25 $a 26 $b 3 $i 2009 $j 07
935|      |$a a597952
  
```

Yes, 853/863 in full effect!

Advantages of the consortial approach

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- **Cost-sharing: hardware, hosting, and support, for a much more robust system than we previously had**
- **A place to grow: as we have grown comfortable with our own system, we are bringing new sites on board in early 2010**

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- OPAC - refined metadata display in templates
- Reporting – no default set of report templates
- Adjustment in general to user-friendly search
- Controlled process to roll out updates

22

OPAC “bibtemplate” allows display of one subfield or all subfields concatenated in a given field, but no demonstration yet of different displays based on, say, codes in numeric subfields (without displaying said subfield)

User-friendly search – for example, a publisher listed in a 710 \$4 with a relator code of 'pbl' is /not/ a corporate author, and no sane user would expect a search against an author index to pull up a publisher as a result.

Because the staff client uses much code in common with the OPAC, and several sites use different approaches for serials, we've broken each other's functionality at times.

Downtime

Conifer downtimes

File Edit View Insert Format Tools Form Help

99.5% uptime and climbing

9/17/2009 21:00:00 | 120 not 120 mins | restarted normally

23

5 unplanned downtimes in three months, most under one hour. Not too bad for a new system, although some of the repeated problems with communication across the cluster are a bit disturbing. Once we nail those down, though, we should be golden.

We use Google Docs to host a shared spreadsheet for tracking our down times & the reasons for those down times.

Problems, features, and docs

Conifer consortial catalogue

Search

logged in as dscott [Logout](#) [Preferences](#) [Help/Guide](#) [About Trac](#)

[Wiki](#) [Timeline](#) [Roadmap](#) **[View Tickets](#)** [New Ticket](#) [Search](#) [Admin](#)

[Available Reports](#) [Custom Query](#)

{1} Active Tickets (92 matches)

- List all active tickets by priority.
- Color each row based on priority.

[Edit report](#) [Copy report](#) [Delete report](#)

Ticket	Summary	Component	Version	Milestone	Type	Owner	Status	Created
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#276	710-Added Entry-Corporate Name	Cataloguing	None		defect	risard	assigned	18/09/09

24

We use Trac to document our processes and track problem reports / feature requests.

At the moment, we have about 80 open issues. I try to open corresponding issues in the common Evergreen bug tracker when they are general Evergreen issues that would be of interest or concern to the entire community.

Canada: a nation of Evergreen early adopters

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- **BC Sitka (second live system)**
- **UPEI (first academic library)**
- **Innisfil Township, Ontario (first known self-hosted public library)**
- **Conifer (first academic library consortium)**
- **Natural Resources Canada**
- **Manitoba SPRUCE (public library consortium)**
- **Mohawk College, Hamilton, Ontario**

25

James Fournie and Brandon Uhlmann from BC Sitka have contributed patches, and BC has contributed tons of documentation.

UPEI has contributed some patches that have led to cool new functionality.

Innisfil contributed a set of training screencasts.

Warren Layton from NRC has contributed a number of patches.

Robert Soulliere from Mohawk has edited a webcast.

Measuring project health

- Number of committers & affiliation
- Number of submitted patches
- Documentation
- Testing
- Community and commercial support
- Current releases & release history

26

"Introducing "Health" Perspective in Open Source Web-Engineering Software Projects, Based on Project Data Analysis"
http://www.schatten.info/pub/iivas/iivas2006_1.pdf)

"Monitoring the "Health" Status of Open Source Web Engineering Projects",
<http://www.schatten.info/pub/ijwis/ijwis2007.pdf>

Balnaves, Edmund. "Open source library management systems: a multidimensional evaluation", Australian Academic & Research Libraries, March 2008.

Good things to come

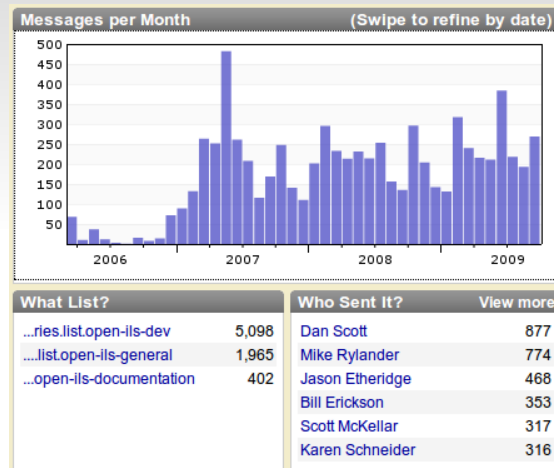
A maturing community

27

Differentiation of roles – and a broader sharing of responsibility

Revisiting community infrastructure

Measuring community: email



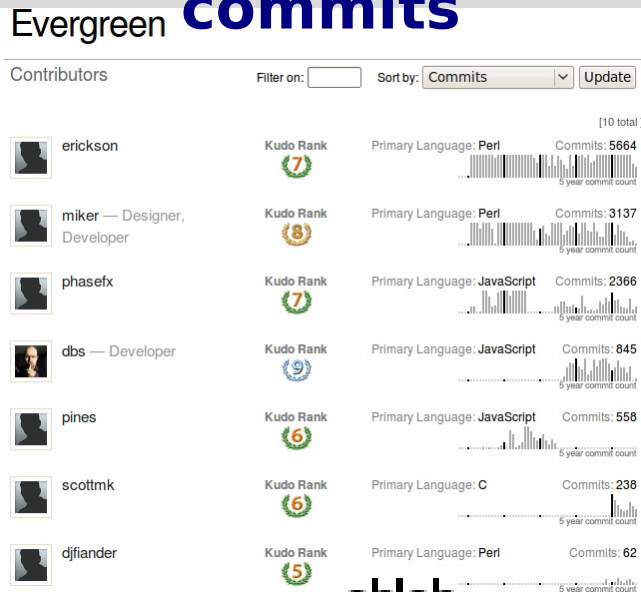
Statistics courtesy 

28

We've been averaging about 200 messages per month on the developer and general lists for the past few years. Some metrics (e.g. Business Readiness Rating) suggest 720 / month is the sign of a healthy community – that's based on a project with an adoption and developer base as large as Apache, which is insane.

200 messages per month, in my opinion, is a healthy base for a niche community like library system software. More would be welcome, of course!

Measuring community: commits



Statistics courtesy

ohloh

29

There's a fairly concentrated set of committers for the project at the moment. We need to mitigate the “bus factor”, for one thing, and broaden the diversity of contributions. The recent hiring of Galen Charlton and Joe Atzberger by Equinox should help, but it would be fantastic to see more contributions from other vendors and the community.

One should note that people like Warren Layton, Bill Ott, James Fournie, and others have contributed a number of patches for bug fixes and new features.

Click to add title

WANTED: skilled developers!

30

There are still a lack of developers able to contribute to Evergreen today.

There's no lack of developers interested in contributing, but it's hard to get a developer ramped up on Evergreen today. There's no good on-ramp, other than spending lots and lots of time with the code, on IRC, the lists...

Bill Erickson (from Equinox) and I gave a one-hour presentation at the Ontario Library Association SuperConference in February 2009 that covered a huge amount of ground very rapidly.

One hour is not enough! And the session wasn't recorded.

Click to add title

Building an on-ramp for developers

31

At the inaugural Evergreen International Conference, Mike Rylander gave an introduction to OpenSRF and Bill Erickson gave an expanded talk on developing with the new Dojo (JavaScript) Web interface widgets. I covered the current internationalization approach and challenges.

Better, but still not enough. And the sessions weren't recorded.

I'm going to be giving a four-hour workshop at the 2010 SuperConference, and I plan to develop a set of tutorial materials that (hopefully) others can work from solo / correct & extend. If at all possible, I'll also have the session recorded and make it freely available.

Click to add title

Communicate, communicate, communicate

32

It's not a failure to communicate, but it's been a challenge. Most of the Evergreen development team is inside Equinox, and it's a heck of a lot easier to talk things out face-to-face / during the course of regular meetings than it is to laboriously work things out on the mailing lists & document plans in the Trac instance and / or wiki.

We also use IRC pretty heavily, and although the logs are available and searchable via Google, it's not the prettiest interface. It also intimidates people who aren't used to IRC and who don't know who the people behind the nicknames are.

Communication is critically important, though. We need to avoid the duplication of effort in finding and resolving bugs – or in potentially working towards different implementations of the same feature.

Click to add title

Rethinking the release process

33

I fired a shot across the bow in early September suggesting a fairly radical reform of the way that Evergreen does releases. We've been doing feature-oriented releases for the major releases, and then bugfixes on top of those after the fact, with a rather complex a.b.c.d numbering scheme – more complex than most other software, in fact.

This is a lot of complexity to manage for a small development team, and it results in useful functionality sitting in a code repository waiting for months to see the light of day before a release comes out.

An early response suggests that the process is going to change radically - huzzah!

Launchpad: Evergreen



Evergreen - Open ILS

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Evergreen is a highly-scalable library system that helps library patrons find library materials, and helps libraries manage, catalog, and circulate those materials, no matter how large or complex the libraries.

This Launchpad project brings together bug reports, frequently asked questions, translations, and blueprints for future development of Evergreen.

[Home page](#) [Wiki](#) [External downloads](#)

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Downloads

Evergreen does not have any download files.

Get Involved

[Report a bug](#) →
[Ask a question](#) →
[Help translate](#) →
[Submit code](#) →
[Register a blueprint](#) →

Announcements

Evergreen has no announcements.

[Make announcement](#)

Project information

Maintainer:

[Dan Scott](#)

Driver:

Not yet appointed.

Uses Launchpad for:

[Answers](#), [Blueprints](#), [Bug Tracking](#), [Branches](#), and [Translations](#).

Programming Languages:

[C](#), [Perl](#), [JavaScript](#)

Licenses:

[GNU GPL v2](#)

[RDF metadata](#)

Series and milestones

[View full history](#)

[trunk](#)

Evergreen trunk series is the current focus of development.

[Register a series](#)

Click to add title

Better living through automation

35

The process for building a release is very laborious at the moment, and not particularly well documented.

Some light: There has been a recent move to commit database migration SQL each time the database schema changes, which will make the database migration script much less manual.

Equinox has committed to building a basic testing framework and automating the release process so that releases can be built on a nightly basis. The automated tests will be run on the release and any errors will be flagged.

Click to add title

I look forward to tests

MozMill for automated UI testing?

36

Okay, I still have nightmares about having skipped classes for an entire semester and then showing up for the final exam, completely unprepared and expecting humiliation.

But software without tests is like a diet of junk food without healthy choices: you can live without them, but you have to be prepared to live with the unhealthy consequences.

Tests provide another onramp for would-be developers; they're a way to learn what is expected from the software, and a comparatively easy way to contribute to the project.

Adding a test for every bug that is fixed makes the project more robust.

Click to add title

Shorter release cycles

37

Once we have daily releases with integrated database migration scripts, it becomes much simpler for us to anoint a given day's release as the next official release.

If we do a good job of tracking bug fixes and enhancements to our issue tracker, then release notes become a simpler task and the documentation team has more to work with to write new / enhanced documentation.

Click to add title

Documentation

38

Once upon a time, there was a technical writer who wrote application development manuals. He also contributed to the Linux Documentation Project, and PHP documentation, and co-wrote a book about a database that almost nobody used that sold very poorly.

One day, he joined a software project that was in desperate need of documentation. “I’m going to write a manual for this software!” he told himself; he just needed to learn the software and write about it.

But as he learned the software, he learned that it had bugs, or needed features, and he started fixing those bugs and adding those features. And apart from whipping together a proof-of-concept table of contents and a very basic style manual, he did nothing more. Enter the DIG!

Click to add title

A solid foundation

39

At the Evergreen conference in May, 2009, there were discussions about forming an Evergreen Software Foundation for various (not necessarily a cohesive set of!) goals.

Goals (from my perspective) should include:

- Handling trademarks and collateral
- 501(c)(3) for US tax-deductible donations directed towards Evergreen community development
- Organize Evergreen conferences

There is progress: GPLS, the current holder of the Evergreen trademarks, recently announced that it is forming a foundation in compliance with the State of Georgia regulations. They are involving the community in the birth of that foundation.

More information

- Evergreen home: <http://evergreen-ils.org>
- Bugs, blueprints, FAQs, and translations: <https://launchpad.net/evergreen>
- Blog aggregator: <http://planet.evergreen-ils.org>
- Mailing lists: <http://evergreen-ils.org/listserv.php>
- IRC: #evergreen on chat.freenode.net
- Laurentian catalogue: <http://laurentian.concat.ca>
- Me: <http://coffeecode.net>

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