

Project Conifer

The Now and the Near-Now

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The promise

Find out how the Evergreen open source library system, originally developed for a public library consortium, is being adapted for academic libraries by three Ontario universities.

Discussion will focus on the challenges, successes and mistakes (err, “learning opportunities”) of the project.

Of note...

- URLs:
 - Evergreen project: <http://evergreen-ils.org>
 - Project Conifer: <http://conifer.mcmaster.ca>
 - These slides (soon): <http://coffeecode.net>
 - Tsuga (Innisfil Public Library):
<http://tsuga.innisfillibrary.on.ca>
- “Evergreen exposed” technical presentation:
 - Friday, 9:05 am, ICH Caledon

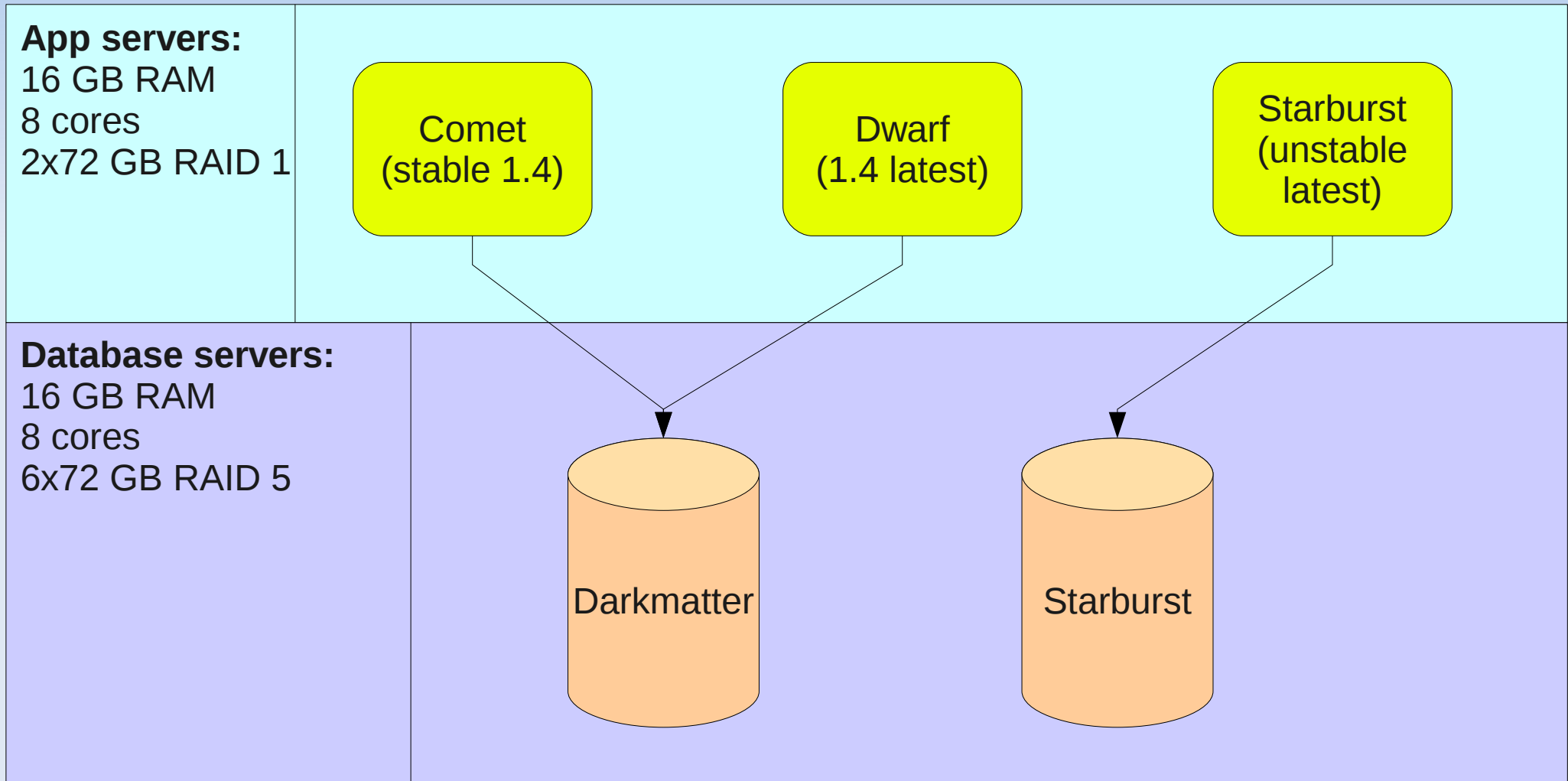
Quick updates

- We've gone from three universities to four universities and a medical school
 - Going live in May, 2009 on a centrally hosted (University of Guelph) consortial system:
 - Algoma University
 - Laurentian University
 - Northern Ontario School of Medicine / Northern Ontario Health Integration Network
 - University of Windsor
 - Sometime thereafter
 - McMaster University (self-hosted system)

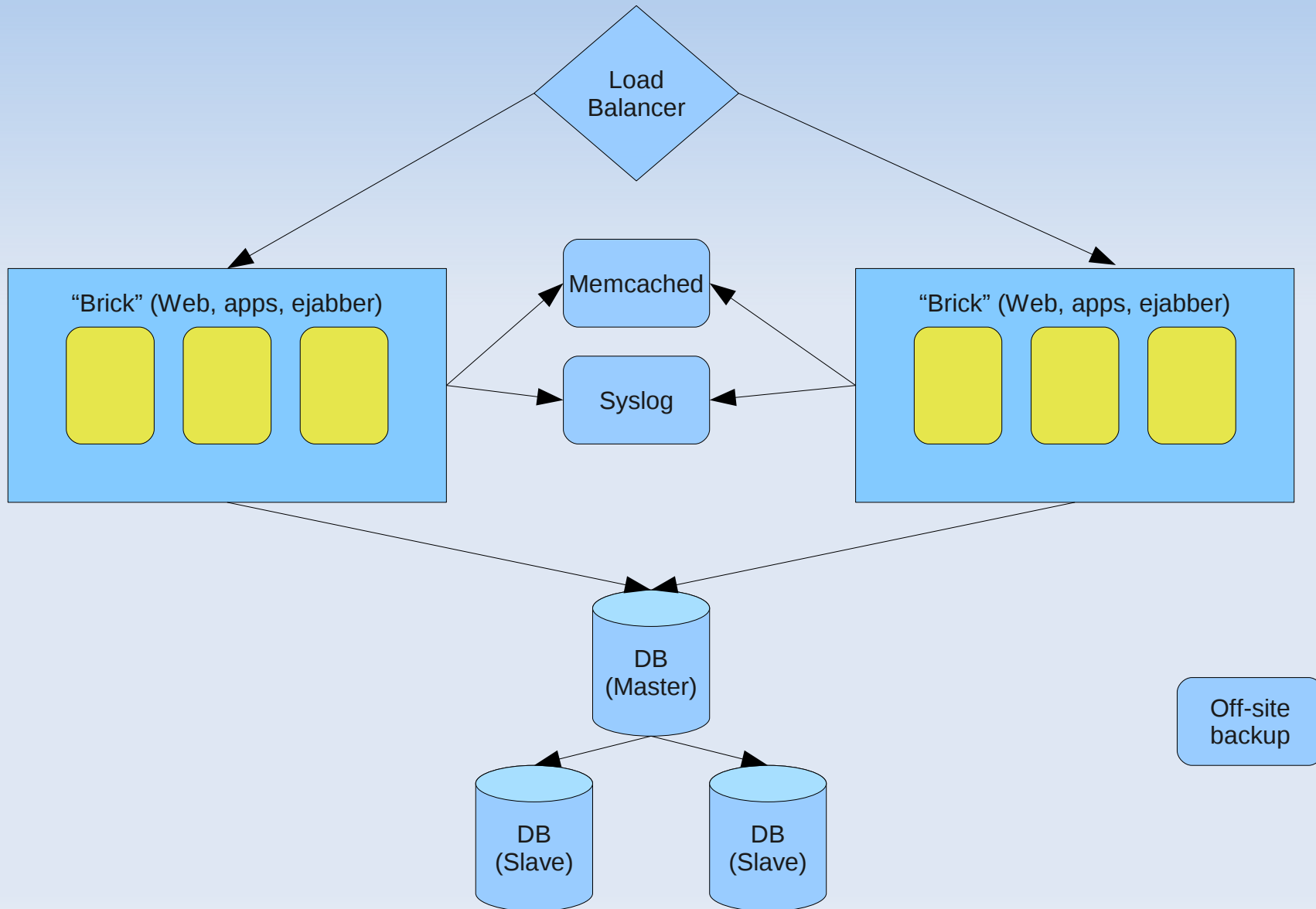
Projected costs

- Year one (pilot and production hardware, additional personnel, migration, support, hosting):
 - Under \$500,000
- Subsequent annual costs (4-year hardware replacement cycle, additional personnel, support, hosting):
 - \$200,000

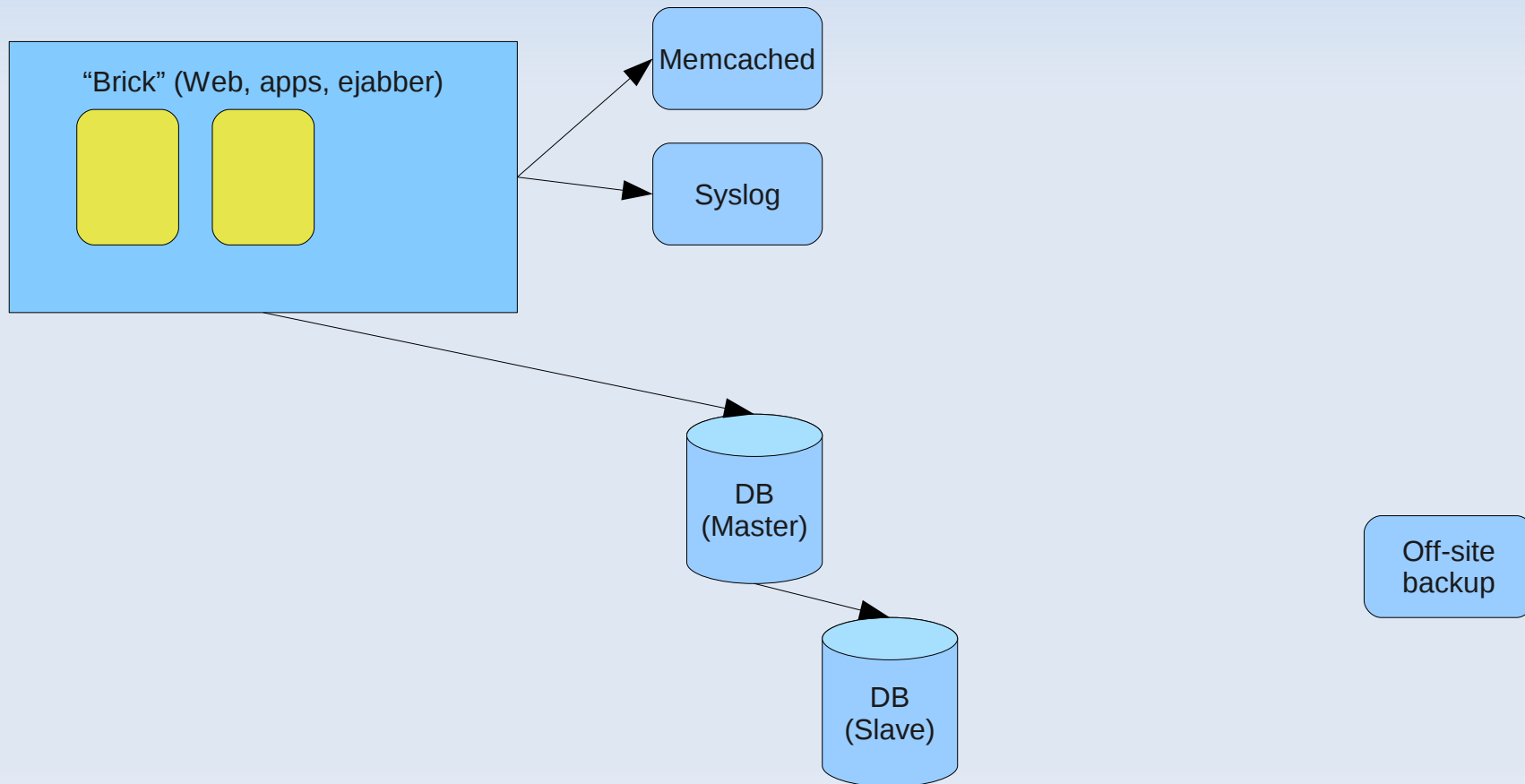
Pilot hardware



Production hardware



Production hardware, v2



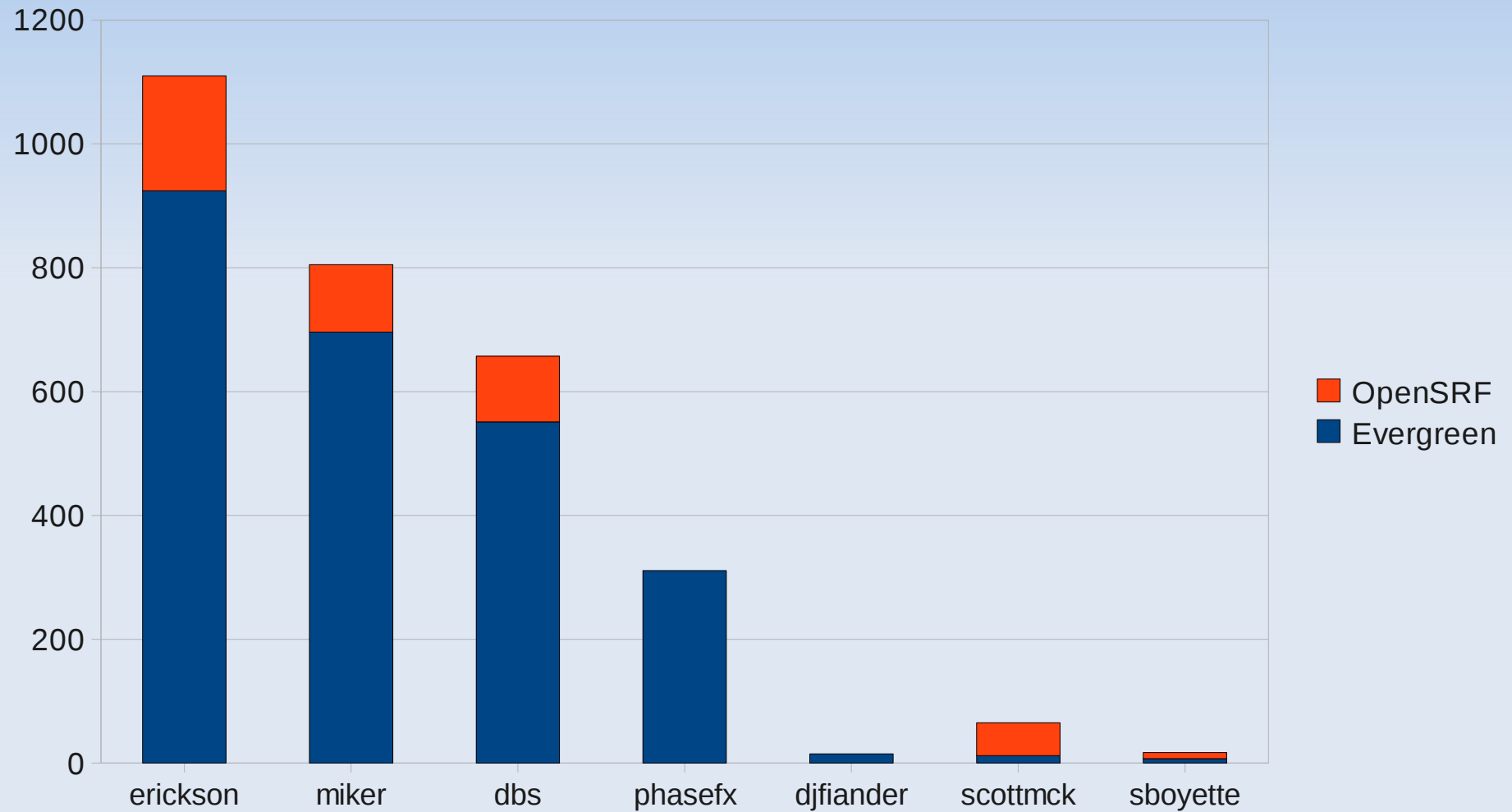
Conifer contributions to Evergreen

- Code
 - Mostly internationalization support
 - French (Canadian)
 - English (Canadian)
 - Armenian
 - Czech
 - Anishnabe (Ojibwe) - hopefully?
 - Academic reserves (SYRUP)
 - Art Rhyno leading the print and electronic reserves management effort since November 2008

Conifer contributions to Evergreen

- Simplified install and configuration
- Support on lists and IRC to other adopters as time permits
- Quality assurance and testing with Evergreen releases
- Documentation

Commits since 2007-09-01



Lessons learned (hopefully)

- Get cost-sharing formulae and prioritization processes nailed down early
- Your project manager and core technical person should not be one and the same
- Open source / free software does not mean “cheap”
 - Total cost of operation for a supported environment with 99.9% availability is probably a wash
 - Return on investment is the real carrot

Challenges

- Pace of development has been slower than anticipated
 - Lack of people employed by the partners who have the required skills to write code
 - Realized this in January 2008 and started hiring contractors; results visible only very recently
 - Art Rhyno (Windsor) kicked into gear in November 2008
 - Robin Isard (Algoma) is coming on board real soon now

Challenges

- Participants want to work with “their” data, but loading large volumes of data is difficult and time-consuming
 - It requires knowledge of MARC and character encodings and Perl scripts and SQL
 - Takes about 30 hours for 4 million bib records on our pilot systems
 - Tackling this in-house represents an opportunity cost for development and customization
 - **Recommendation:** Pay someone early to set up a stable test system with a representative sample of data

Challenges

- Overcoming the temptation to continue old way of doing things
 - Mark Leggott (UPEI) makes a strong case for abandoning classic serials management workflows
- Parkinson's law:
 - *Work expands so as to fill the time available for its completion*
 - This is probably the best counter-argument to those who don't want to migrate until everything is ready

Should you 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

- And now a word from a friendly Evergreen instance with the following Conifer connections:
 - Deb Mann, Librarian – spent a co-op term at Laurentian University
 - Innisfil Township – close to Dan Scott's hometown of Barrie

**How & Why****Staff Training****Videos****News****Resources****Manuals****Contact**

Additional Links Welcome to Tsuga

[Tsuga Catalogue](#)[Innisfil Public Library](#)[Evergreen](#)[Sitka BC Public Library](#)[Georgia Libraries
PINES](#)

Welcome to TSUGA, Innisfil Public Library's iteration of Evergreen, an open-source consortial-quality ILS that was developed by the Georgia Public Library Service and the Public Information Network for Electronic Services (PINES) consortia.

Evergreen was launched by the PINES consortia in September 2006; but it wasn't until the following year that we became aware of this significant event. Our library system, in conjunction with a library system located to the south of our municipality, was actively searching for a replacement to our aging ILS. We had our funding approval for a new system; key vendors had provided demonstrations of their respective software, and we had our selection/implementation team in place. The Innisfil selection team was close to a decision when our research led us to an article in the March 2007 addition of Computers in Libraries entitled An Update on Open Source ILS by Marshall Breeding and a subsequent article ILS Migration in the 20th Century (July/August 2007) in the same journal by Frank Cervone. These articles provided the motivation, and indeed challenged us to take on an open source solution.

After almost a year of hard work, Innisfil quietly launched its new collection management system on October 7, 2008, followed by a public debut during Ontario Public Library Week (October 19-25, 2008). The catalogue is available through the library's website at www.innisfil.library.on.ca. To mark our achievement, we held a staff competition and subsequently named our new system "Tsuga" (Hemlock) after the outstanding majestic evergreen that can be found in Ontario forests.

Since the launch of Tsuga, the implementation team has developed cataloguing templates, reports, tutorials and training manuals. In an effort to give a little back to the broader Evergreen community, Debra Mann and Mandy Pethick, the Innisfil team members responsible for the in-house training program, have created some instructional "winks" that can be used by staff, library customers and those considering Evergreen as an ILS solution. These can be found at www.innisfil.library.on.ca/tsuga

Innisfil's "single-plant" of Evergreen was managed by library staff (Grant Cowan, John van Rassel, Debra Mann, Mandy Pethick, Marilyn Pillar and Susan Downs) working in conjunction with Garry Dunn, President of Trellis Consulting. Throughout the process they were positive,

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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
 - Academic reserves
 - Serials
 - Hardcore MFHD
 - Generated and textual summaries
 - Predictions, check-in, claiming

Project Conifer road map

- ~~October 2008~~ February 2009 and forever after:
 - Testing, testing, testing
 - ✓ Update our test servers and migrate data for bibs, patrons, acquisitions, etc
 - ✓ Usability – get training on available functionality and 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 (where “system” might mean temporary workaround):
 - Holdings
 - Acquisitions
 - Serials
 - Reserves
 - Circulation rules
 - Test, test, test

Project Conifer road map (3)

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

Some anticipated questions

- Does this mean shared bibliographic records? **As much as possible. 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 sharing 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
 - If we grow, then eventually we will probably fund 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 do 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