Evergreen: freedom and control

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Ontario public libraries: Sample of current ILS usage

- **A variety of systems in use:**
  - **Dynix** – Barrie, Guelph, Midland, Sault Ste. Marie, Toronto, Timmins
  - **Geac** – Kingston, Orillia
  - **III** – London, Sudbury, Thunder Bay
  - **Mandarin** – St. Marys
  - **Multilis** – Hearst
- Quick survey:
  - How much do you pay for license and support today?
  - How much staff time is devoted to the care and feeding of your ILS today?

Consortial cost-sharing

The two County Library Co-operative servers host the databases of five member libraries - Clearview, Coldwater, Essa, Penetanguishene, and Tay - as well as the County Co-operative catalogue. *County Library staff administer the Horizon library software program, provide training to the staff of member libraries and troubleshoot any problems encountered with the software.*

http://www.county.simcoe.on.ca/cultural-and-information-services/library-co-operative/library-co-operative-services/

Return on Investment (ROI)

Tangible benefits result from cost reductions, cycle-time improvements, **decreases in errors and rework**, **improved asset utilization**, **lower capital costs**, and other metrics. Intangible benefits also can be valued by including opportunity costs, the ability to scale without adding resources, and **improved response to customer demands**.

Hill, John. *Are ROI Metrics For Technology Valid?*
http://www.optimizemag.com/issue/008/squareoff.htm

Libraries already support themselves

- From our vendor's closed mailing lists:
  - API (programming and customization)
    - March: 125 messages
    - April (to date): 92 messages
  - System administration
    - February: 435 messages
    - March: 969 messages*
    - April (to date): 251 messages
- Many are classic support questions:
  - How do I do X? Does patch Z fix this bug?
- **We support ourselves better than the support we're paying for!**

Growing Open-ILS.org community

- All Evergreen documentation and all PINES training material is available at open-ils.org
- Mailing lists are open to all:
  - open-ils-general volume
    - January: 26, February: 12
    - March: 76, April: 50
  - open-ils-dev volume
    - January: 63, February: 120
    - March: 188, April: 83
- Developers participate vigorously
  - Demonstrates pride in their work
  - Openness to suggestions and feedback

Open source:
You're already soaking in it.

- Many library products already buy products built with open source components:
  - Ex Libris SFX 3.0: MySQL, Perl
  - III: MySQL
  - SirsiDynix Unicorn: Cygwin, Apache HTTPD
- Many organizations build solutions incorporating open source:

  According to Evans Data, nearly two-thirds of developers in North America use open-source modules in the applications they write.

The Enterprise Committer: When Your Employee DevelopsOpen-Source Code on the Company Payroll. http://www.cio.com/article/28487/

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Lessons from a parallel world

- History of the consolidation of the relational database market
  - In the late 90's, the focus was on market share
  - Major players gobbled up competition
  - By 2004, marketing finally accepted MySQL and PostgreSQL as valid threats
    - Free to download, deploy, and use in production
    - Easy to develop applications
    - New database developers were highly skilled in MySQL and PostgreSQL
  - Suddenly free (but limited) versions of the major databases hit the market in 2005...

Multilingual support

- Historically, we run one or two versions behind the current release of our current ILS
  - We pay, and then wait, for French translation ... as does every other site requiring French
- Evergreen was built with multilingual support
  - Translating the 2000 words, at $0.25/word, costs $500
  - Contributing that translation to Evergreen then helps every other French site
- Evergreen gives us the freedom to share

VMWare image of Evergreen

- *Virtualization*: running one or more guest operating systems in a host operating system
  - So you can easily run Linux on Windows
- Enter **VMWare Server:** a free virtualization product
- The VMWare image of Evergreen includes a ready to run operating system, database, Web server, and Evergreen application
  - Evaluation, demonstration, testing, and training can all be accomplished on your own copy of Evergreen
  - Small sites could run this in production

When support goes bad

- What happens if you don't like the support offered by the vendor of a closed ILS?
  - We have had support requests go unanswered for months.
  - We have had our system made more unstable by support "fixes".
  - We build our own support networks through mailing lists, chat rooms, etc.
- You can't even buy a "Dummies Guide" or other third-party book for any ILS - it's the vendor's documentation, or nothing at all.

Open = Options

- Evergreen offers classic support options:
  - **Equinox** - the original developers
  - **LibLime** – subcontracted David Fiander to develop self-checkout module
- Support can be 24x7 or piece-meal
- You can hire your own support team
- Or you can purchase support for individual elements of Evergreen systems:
  - Linux (RHEL, Ubuntu, SLES, others)
  - PostgreSQL (for database replication, backup)
  - Hardware (comes with high-end servers)

Challenges, challenges

- Pressures on the core development team
  - Conferences, site visits
  - Mailing lists
  - Getting new contributors up to speed
  - Building Equinox as a company
- Collective infrastructure approach
  - Makes sense financially
  - Savings balanced vs. local control
- Do our current license agreements prevent us from openly sharing migration instructions?

In closing

- When you choose an open system, your investments in staff training, patron education, and software development are never sunk costs.
- Open source is already mainstream. It's not about cost, it's about freedom.
- VMWare images will make it easy to get started with Evergreen.
- The library community's culture of mutual support is already visible with Evergreen.

Join us!

- Mailing list:
  - http://open-ils.org/listserv.html
- IRC:
  - irc://irc.freenode.net/#OpenILS-Evergreen
  - also irc://irc.freenode.net/#code4lib
- Main site:
  - http://open-ils.org