

Springing into Evergreen 2.x

REVISION HISTORY

NUMBER	DATE	DESCRIPTION	NAME

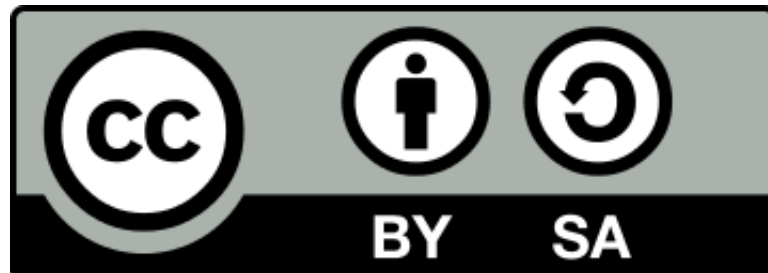
Contents

1	Important stuff up front	1
2	Upgrade to 2.x: schedule	1
3	Communication	1
4	Evergreen release timeline	1
5	Configurable - Blessing / Curse	2
6	Public catalogue features	2
7	Public catalogue - Basic search	3
8	Public catalogue - Advanced search	3
9	Public catalogue - Features (2)	4
10	Cataloguing - Authorities	5
11	Importing authorities	6
12	Managing authorities	7
13	Editing an authority record	7
14	Editing an authority record: result	9
15	Merging authority records	9
16	Controlling fields manually	10
17	Browsing authority records	10
18	Cataloguing - Serials	12
19	Serials - Enumeration wizard	13
20	Serials - Chronology wizard	14
21	Serials - Frequency wizard	15
22	Serials - Predictions	15
23	Serials - Check in	16

24 Serials - Missing in action	17
25 Cataloguing - Flat-text MARC editor	17
26 Cataloging - Classification and call numbers	18
27 Copy location editor	19
28 Spine label editor	20
29 Circulation - Patron registration	20
30 Circulation - Rules	23
31 Circulation - Multi-item sets	24
32 Circulation - Mark Missing Pieces	25
33 Circulation - Missing pieces (confirm and note)	25
34 Circulation - Missing pieces patron note	26
35 Circulation - Bound-withs	26
36 Circulation - Hard due dates	27
37 Circulation - Holds	27
38 Circulation - Notifications	28
39 Booking / reservations	28
40 Booking - Create reservation	29
41 Booking - Capture reservation	30
42 Booking - Pick up reservation	31
43 Circulation - Other	31
44 Acquisitions	32
45 Acquisitions - Funding sources	32
46 Acquisitions - Funds	33
47 Acquisitions - Providers	34
48 Acquisitions - Ordering	34

49 Integration	35
50 Documentation	35
51 Independence and governance	35
52 Upgrade to 2.x: schedule	35
53 Communication	36
54 Testing - Circulation	36
55 Testing - Cataloguing	36
56 Testing - Public interface	37
57 Testing - System integration	37
58 Summer projects	37

This talk is licensed under a [Creative Commons, Attribution, Share Alike license](#).



Evergreen's code is licensed under the [GNU General Public License, version 2](#) or later.

1 Important stuff up front

- 2.x upgrade schedule
- Communication channels

2 Upgrade to 2.x: schedule

Goal for May: upgrade to newest version of Evergreen without loss of existing functionality

Now → end of May	Testing and (re)training with 2.x functionality
Friday, April 8th	Upgrade test server to 2.0.5
Friday, April 15th	Port catalogue skins to 2.0.x
Wednesday, April 20th	Upgrade test server to 2.1 beta
Week of April 25th	Evergreen Conference
Week of May 2nd	Port circulation rules to 2.1 (in-database)
Week of May 16th	Final testing: public interface, circulation, cataloguing
Weekend of May 20th	Upgrade to 2.1
Weekend of May 27th	Contingency: Upgrade to 2.1

3 Communication

- Conifer is a consortium, not a set of individual libraries
- Preference is to discuss first and get it right once across most or all libraries
- Channels:
 - Many-to-many: [Conifer discussion list](#)
 - Many-to-many (specialized): Circulation / Cataloguing / Public interface groups
 - One-to-many: [Conifer tickets](#)
 - One-to-one: Contact individual Conifer systems person
 - * Perfectly appropriate for **SYSTEM IS DOWN!**

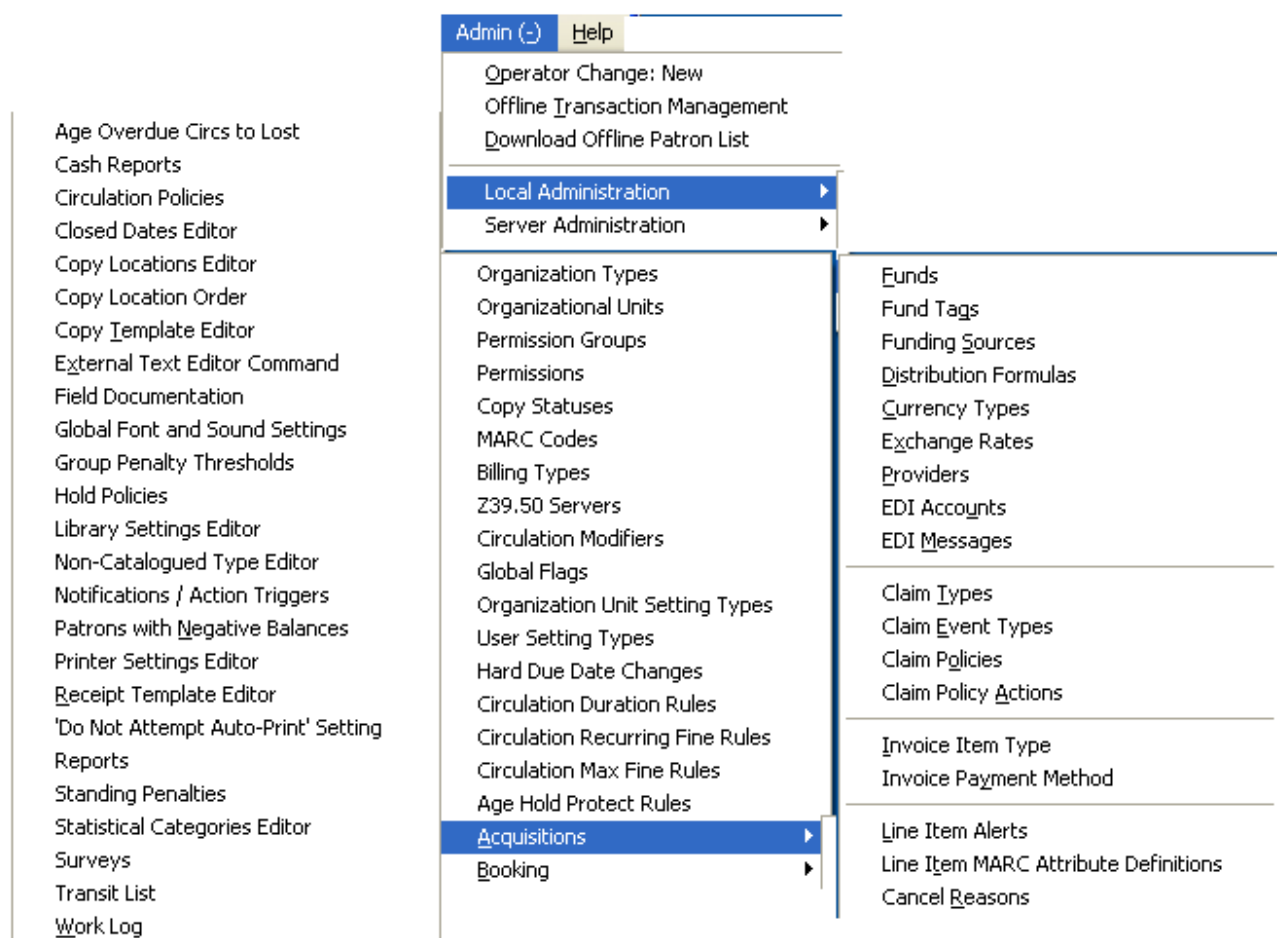
4 Evergreen release timeline

Release	Date
1.0	September 2006
1.2	July 2007
1.4	January 2009
1.6.0	November 2009
1.6.1	June 2010
2.0	January 2011
2.1 beta	April 2011

Steady pace of releases featuring enhancements over time; so what's *not* in 2.0?

5 Configurable - Blessing / Curse

Before you ask, almost everything in Evergreen is configurable; too configurable, perhaps...

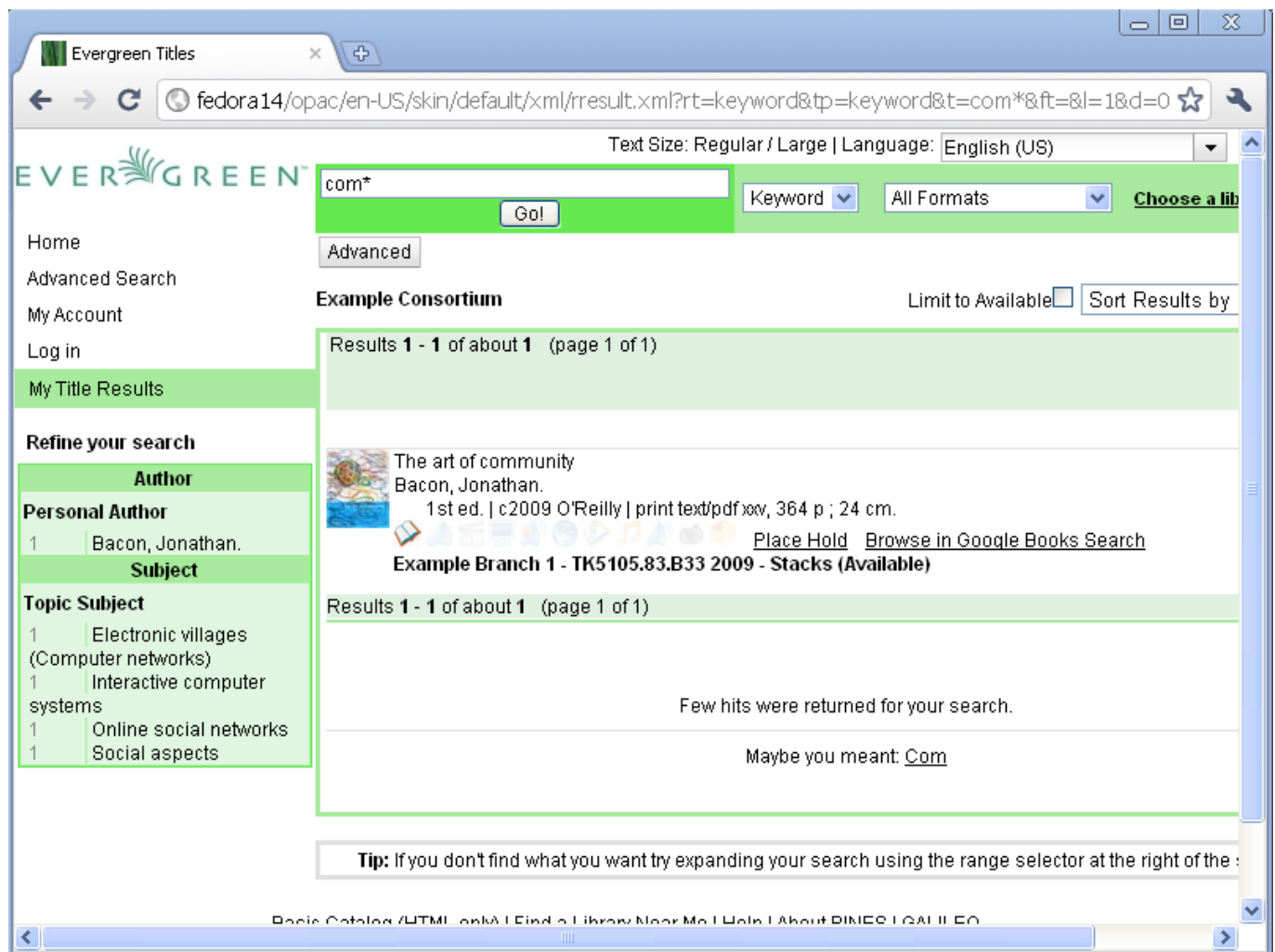


6 Public catalogue features

- Added content (cover images, reviews, etc) from many sources:
 - OpenLibrary (default, cover images, tables of content)
 - * Conifer is adopting OpenLibrary as its content provider

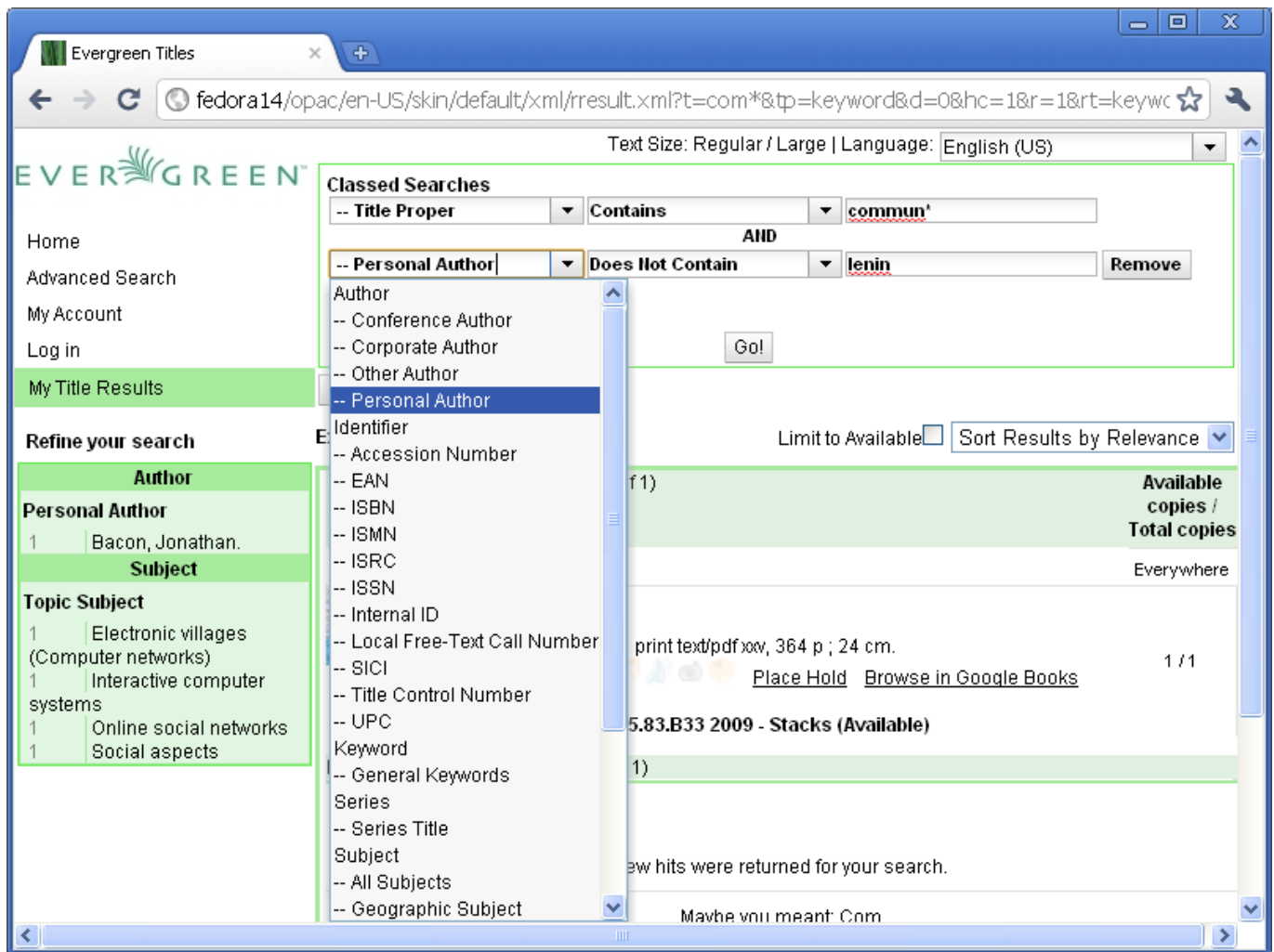
- ChiliFresh (reviews) - *not Conifer*
- ContentCafe (reviews) - *not Conifer*
- Syndetic (cover images, reviews, author biographies, notes) - *not Conifer anymore*
- Google Books (full or partial previews)
- Amazon (cover images) - *not Conifer*
- Improved faceting:
 - Displays record counts for each facet
 - Selection is ANDed to current search, multiple facets supported
 - Facets derived predictably from records returned in search results

7 Public catalogue - Basic search



8 Public catalogue - Advanced search

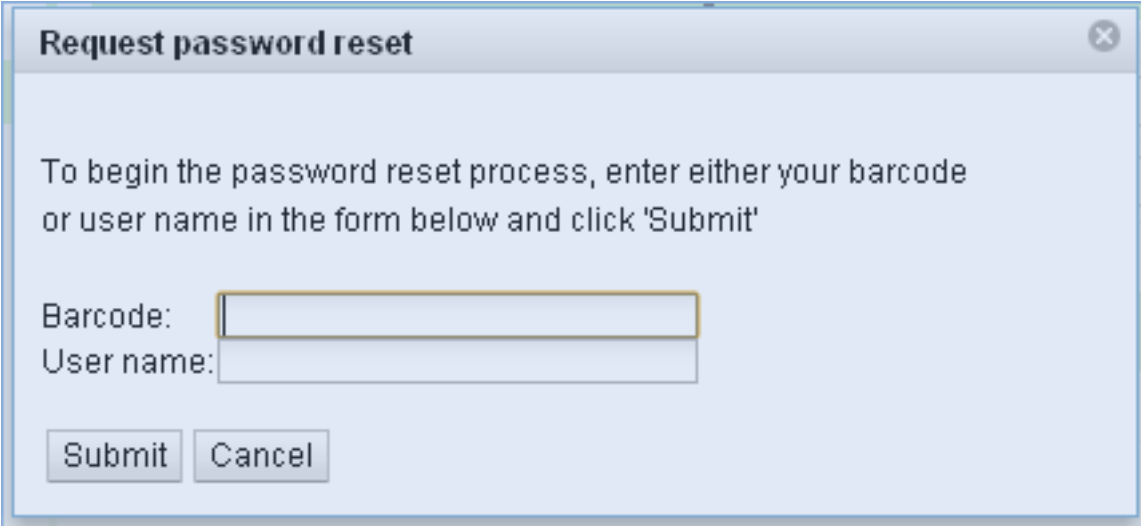
- Search with truncation operators ("child*")
- Search with Boolean operators (AND, OR, NOT)



- Exact phrase searching: `"quote text"`
- NOT operator by prefixing word or phrase with hyphen: `'-notgonnaincludeme'`
- Search specific indexes by prefixing index name: `"title:who has seen the wind"`
- Search more granular indexes by prefixing index name and subindex: `"author|personal:margaret atwood"`
- Limit search to specific shelving locations
- Specify MARC item type / format characteristics in excruciating detail
- Search specific tag/subfield combinations

9 Public catalogue - Features (2)

- Display of arbitrary MARC data (*BibTemplate*) in search results and record details

A screenshot of a web browser dialog box titled "Request password reset". The dialog has a light blue background and a standard window border with a close button in the top right corner. Inside the dialog, there is a text instruction: "To begin the password reset process, enter either your barcode or user name in the form below and click 'Submit'". Below this text are two input fields. The first is labeled "Barcode:" and the second is labeled "User name:". Both fields are empty and have a thin border. At the bottom of the dialog, there are two buttons: "Submit" and "Cancel", both with a light gray background and a thin border.

- Patrons can update their own contact information, reset their passwords
- Call number browse normalized to per-library classification scheme (Dewey and LC supported out of the box)
- **Missing:** a full-featured catalogue suitable for low-bandwidth connections or Internet Explorer
 - A working proof of concept has been developed; with some work it could completely replace the existing catalogue
- **Missing:** significant social features such as patron-generated reviews, ratings
 - There is some exploratory code in this area outside of 2.0; see [this Access 2010 presentation](#)
 - Current catalogue is an Ajax dream/nightmare
 - Makes many requests, which can take a long time to complete over a low-bandwidth connection
 - Internet Explorer has a terrible time managing memory in JavaScript and quickly slows to a crawl (or crashes Windows entirely)
 - ... Development team hopes to rewrite the catalogue to be bandwidth/mobile/Internet Explorer-friendly

10 Cataloguing - Authorities

- Categories of authorities:
 - Author: 100:a, 110:a, 111:a
 - Subject: 148:a, 150:a, 151:a, 155:a
 - Title: 130:a
 - Topic: 150:a
- Changes to an authority propagate to linked bibliographic records
- A [script](#) is available to link bibliographic records against authorities
 - We will run this script for Conifer's authority records
 - First we have a massive amount of de-duplication to tackle, because we loaded all of Windsor and Laurentian's authority records when we migrated to Conifer

11 Importing authorities

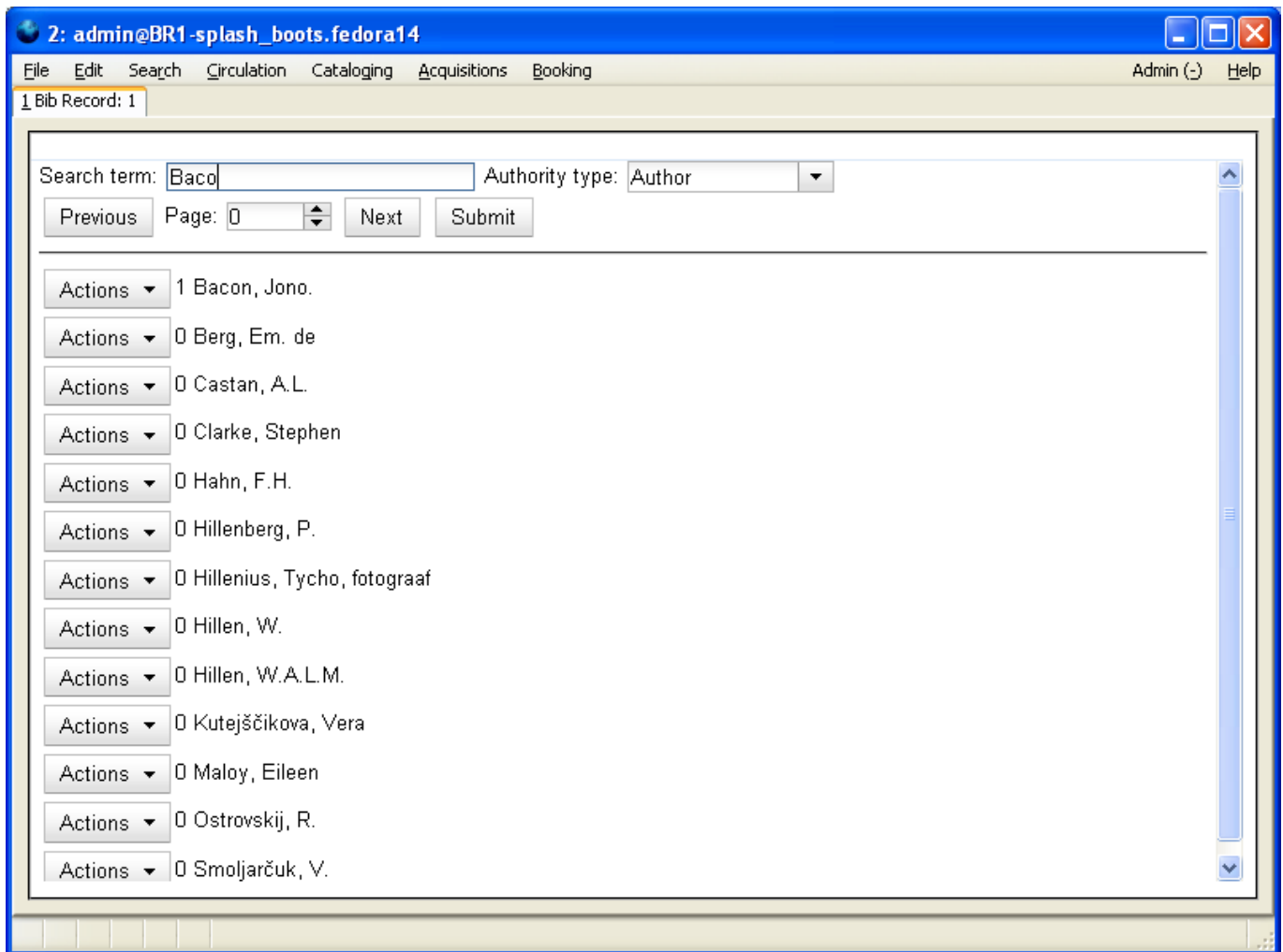
- Authorities in MARC or MARCXML format can be imported via the MARC Batch Import/Export tool
- Once authorities have been de-duplicated, duplicate authorities are prevented in the future

The screenshot shows a web browser window with the address bar displaying "1: admin@BR1-splash_boots.fedora14". The browser has a menu bar with "File", "Edit", "Search", "Circulation", "Cataloging", "Acquisitions", and "Booking". The "Server Settings" tab is active. The main content area is titled "Evergreen MARC File Upload" and contains the following fields and controls:

- Record Type:** A dropdown menu set to "Authority Records".
- Create a New Upload Queue:** An empty text input field.
- or Add to an Existing Queue:** A dropdown menu set to "personal_authorities".
- Auto-Import Non-Colliding Records:** A checkbox that is checked.
- Auto Merge/Overlay Exact Matches:** An unchecked checkbox.
- Auto Merge/Overlay When Exactly 1 Match is Found:** An unchecked checkbox.
- Merge/Overlay Profile:** An empty dropdown menu.
- Holdings Import Profile:** An empty dropdown menu.
- Select a Record Source:** A dropdown menu set to "oclc".
- File to Upload:** A text input field containing "C:\Documents and Settings\Reference\My Documen" and a "Browse..." button.

At the top of the main content area, there are navigation buttons: "Go Back", "Reload", and "Go Forward". On the right side, there are buttons for "Debug" and "Print Page". A toolbar at the top of the main content area includes icons and labels for "Export Records", "Import Records" (which is highlighted), "Inspect Queue", "Edit Attributes", "Edit Merge / Overlay Profiles", and "Edit Import Item Attributes".

12 Managing authorities



13 Editing an authority record

- **Actions** → **Edit** opens the authority record in a MARC editor:

Options

☐ Stack subfields ☐ Flat-Text Editor [Validate](#) [Save \(D\)](#) [Help](#)

MARC Record

Fixed Fields -- Record type: AUT

Type	z	ELvl	o	Item	GeoDiv	Roman	CatLang
Kind		Rules		SHSys	SerType	SerNum	HeadMain
HeadSubj		HeadSer		TypeSubd	TypeGov	RefEval	RecUpd
NameDiff		Level		ModRec	CatSrc		

LDR	z	Record Content
LDR		nz a22 o 4500
001		1
003		TEST
008		
035		+a (CONS) 1
040		+a TEST +c TEST
100		+a Bacon, Jonathan.
901		+c 1 +t authority

14 Editing an authority record: result

The screenshot shows the Evergreen library system interface. The top navigation bar includes links for File, Edit, Search, Circulation, Cataloging, Acquisitions, and Booking. The user is logged in as 'admin'. The main content area displays the 'Record Summary' for a book titled 'The art of community' by Jonathan Bacon. The record includes fields for Title, Author, Edition, Pub Date, TCN, Record ID, Record Owner, Created By, Last Edited By, and Last Edited On. The record is identified as 'Record 1 of 1'. Below the record summary, there is a search bar with a 'Go!' button and a dropdown menu for 'Keyword'. The left sidebar contains links for Home, Advanced Search, My Account, and My Title Results. The bottom of the interface shows a Google search bar and a list of records.

Record Summary (View MARC)

Title: The art of community **Edition:** 1st ed. **TCN:** 1 **Created By:** admin
Author: Bacon, Jonathan. **Pub Date:** c2009 **Record ID:** 1 **Last Edited By:** admin
Bib Call #: TK5105.83.B33 2009 **Record Owner:** **Last Edited On:** 1/28/11 4:05 PM

Record 1 of 1 [Start](#) [Previous](#) [Next](#) [End](#) [Go Back](#) [Reload](#) [Go Forward](#) [Print Page](#)

Text Size: Regular / Large | Language: English (US)

EVERGREEN™ [Go!](#) [Keyword](#) [All Format](#)

[Home](#) [Advanced Search](#) [My Account](#) [You are logged in as admin](#)

[My Title Results](#) [My Title Details](#)

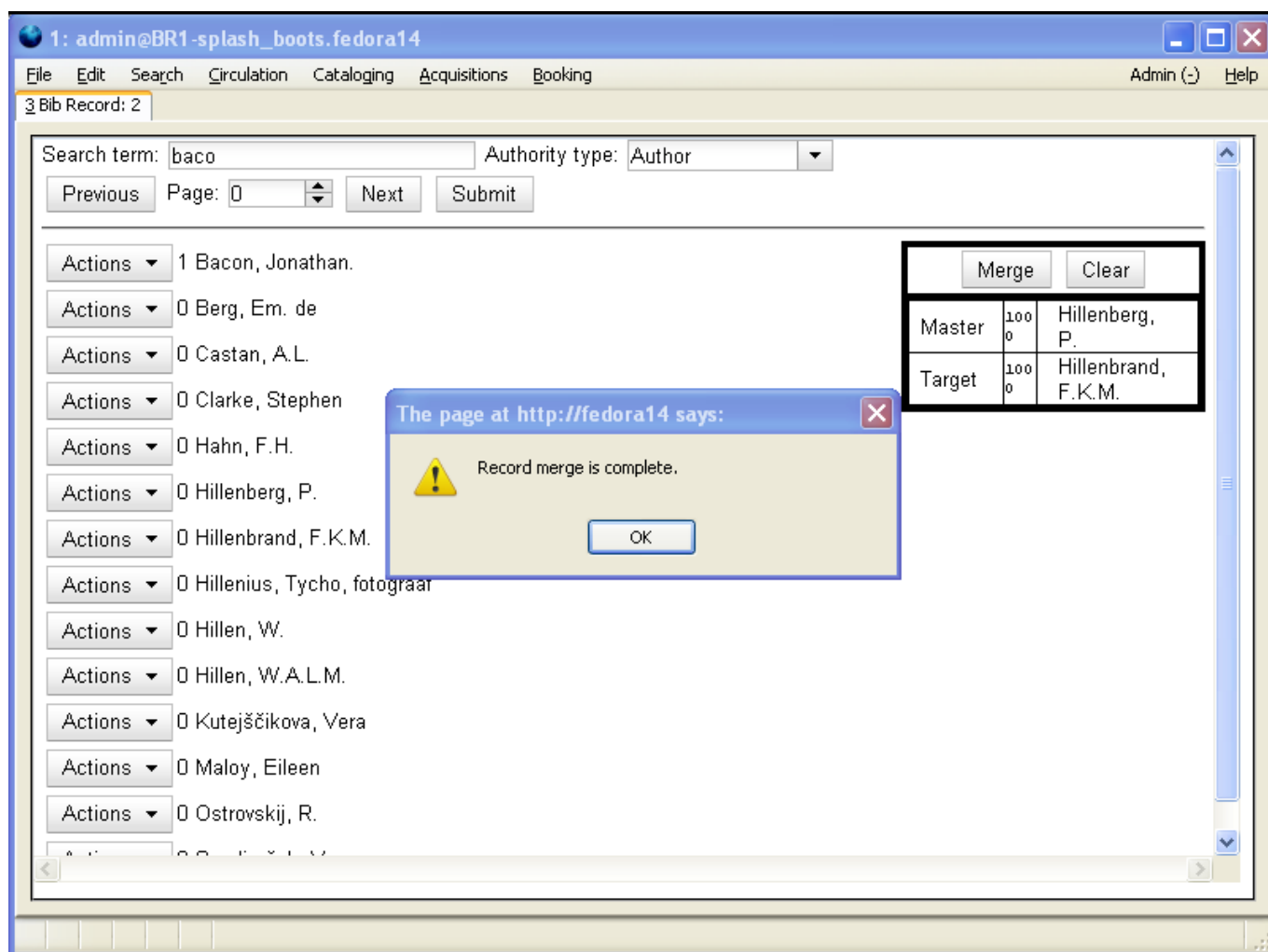
Example Branch 1

Record Summary

Title	The art of community / Jono Bacon.
Author	Bacon, Jonathan.
ISBN	9780596156718
Edition	1st ed.
Publication Date	c2009
Publisher	O'Reilly
Physical Description	print text/pdf xxv, 364 p ; 24 cm.
Format	text
Abstract	

15 Merging authority records

- **Action** → **Merge** enables you to merge two or more authority records
- Linked bibliographic records get linked to the master authority record



16 Controlling fields manually

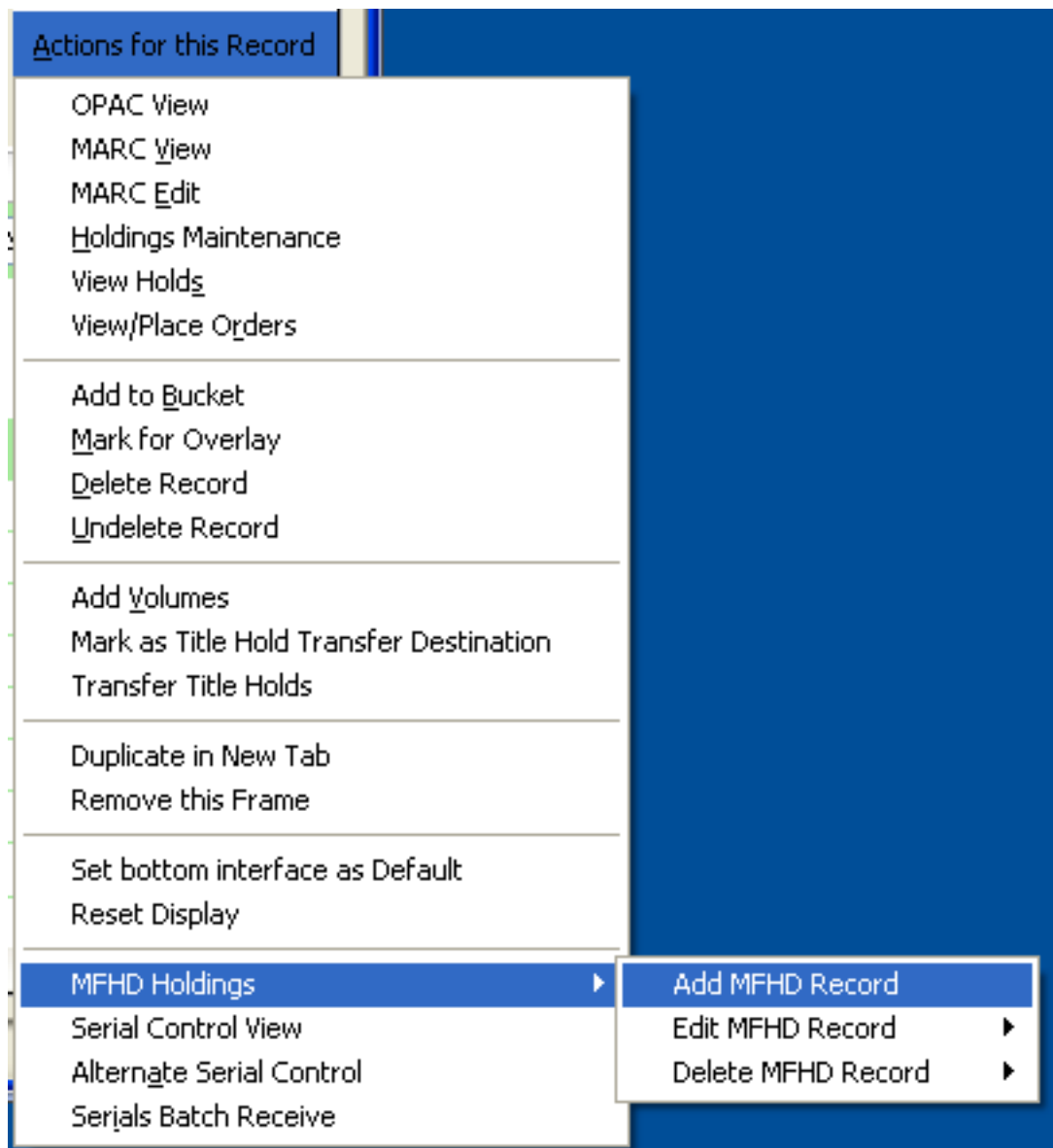
- Fields in bibliographic records that are controlled by an authority record will be linked via a \$0 subfield per MARC rules
- Right-clicking a field in the MARC Editor triggers an alphabetical browse of available authority records, including 4xx and 5xx matches
- Ability to create an authority record on the fly
- **Missing:** linkage between authority records (5xx)

17 Browsing authority records

- The classic MARC editor offers an authority browser on controllable fields

[illegible]

18 Cataloguing - Serials



- Not just one, but two user-friendly interfaces for predicting and receiving serials
 - And one raw MFHD interface for the hardcore
- Procedure:
 1. Create a *subscription*
 2. Add the *captions and patterns* for the serial
 3. Add a *distribution* with a copy attribute template
 4. Create one issuance for that combination of subscription and distribution
 5. Generate predictions starting from that issuance
 6. Receive the issues

19 Serials - Enumeration wizard

×

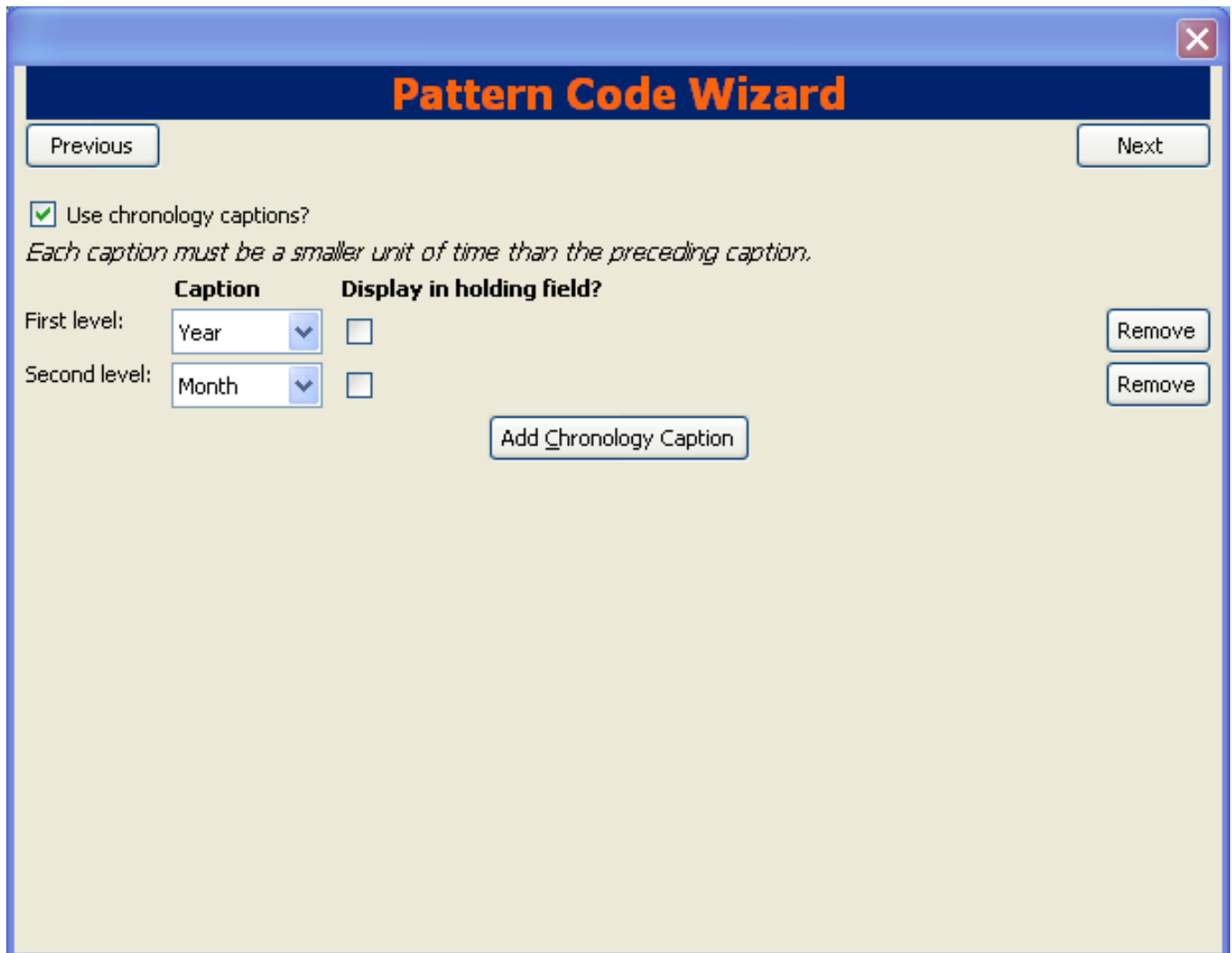
Pattern Code Wizard

PreviousNext

☒ Use enumerations?
"v." and "no." are common first and second level enumeration captions.

Enumeration Caption	Units Per Higher Level	Numbering Continuity	
First level: <div>v.</div>			Remove
Second level: <div>no.</div>	<div><input checked="" type="radio"/> Number 12</div> <div><input type="radio"/> Varies</div> <div><input type="radio"/> Undetermined</div>	<div>Restarts at unit completion</div>	Remove
<div>Add Enumeration</div> <div>Add Alternate Enumeration</div>			

20 Serials - Chronology wizard



The image shows a 'Pattern Code Wizard' dialog box with a blue title bar and a close button in the top right corner. The title bar contains the text 'Pattern Code Wizard' in orange. The main area has a light beige background. At the top left is a 'Previous' button and at the top right is a 'Next' button. Below these is a checked checkbox labeled 'Use chronology captions?'. Underneath the checkbox is the instruction: 'Each caption must be a smaller unit of time than the preceding caption.' Below this instruction is a table with two columns: 'Caption' and 'Display in holding field?'. The table has two rows: 'First level:' with 'Year' in a dropdown menu and an unchecked checkbox; and 'Second level:' with 'Month' in a dropdown menu and an unchecked checkbox. To the right of the table are two 'Remove' buttons. At the bottom center is an 'Add Chronology Caption' button.

Pattern Code Wizard

Previous Next

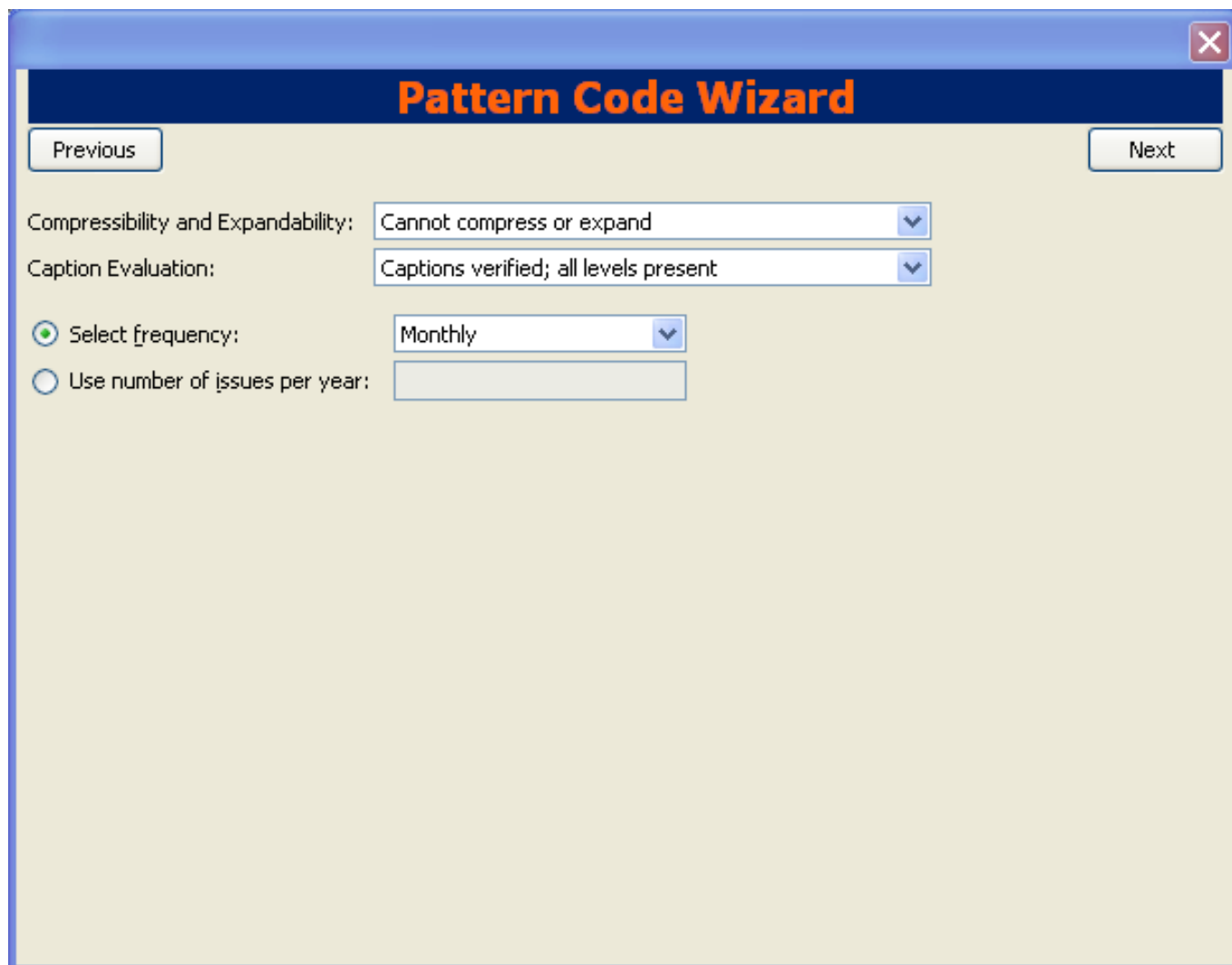
☒ Use chronology captions?
Each caption must be a smaller unit of time than the preceding caption.

	Caption	Display in holding field?
First level:	Year	<input type="checkbox"/>
Second level:	Month	<input type="checkbox"/>

Remove Remove

Add Chronology Caption

21 Serials - Frequency wizard



The image shows a 'Pattern Code Wizard' dialog box with a blue title bar and a close button in the top right corner. The title 'Pattern Code Wizard' is in orange text on a dark blue background. The main area has a light beige background. At the top left is a 'Previous' button and at the top right is a 'Next' button. Below these are two dropdown menus: 'Compressibility and Expandability:' with the value 'Cannot compress or expand' and 'Caption Evaluation:' with the value 'Captions verified; all levels present'. Below these are two radio button options. The first is 'Select frequency:' with a selected radio button and a dropdown menu showing 'Monthly'. The second is 'Use number of issues per year:' with an unselected radio button and an empty text input field.

Pattern Code Wizard

Previous Next

Compressibility and Expandability: Cannot compress or expand

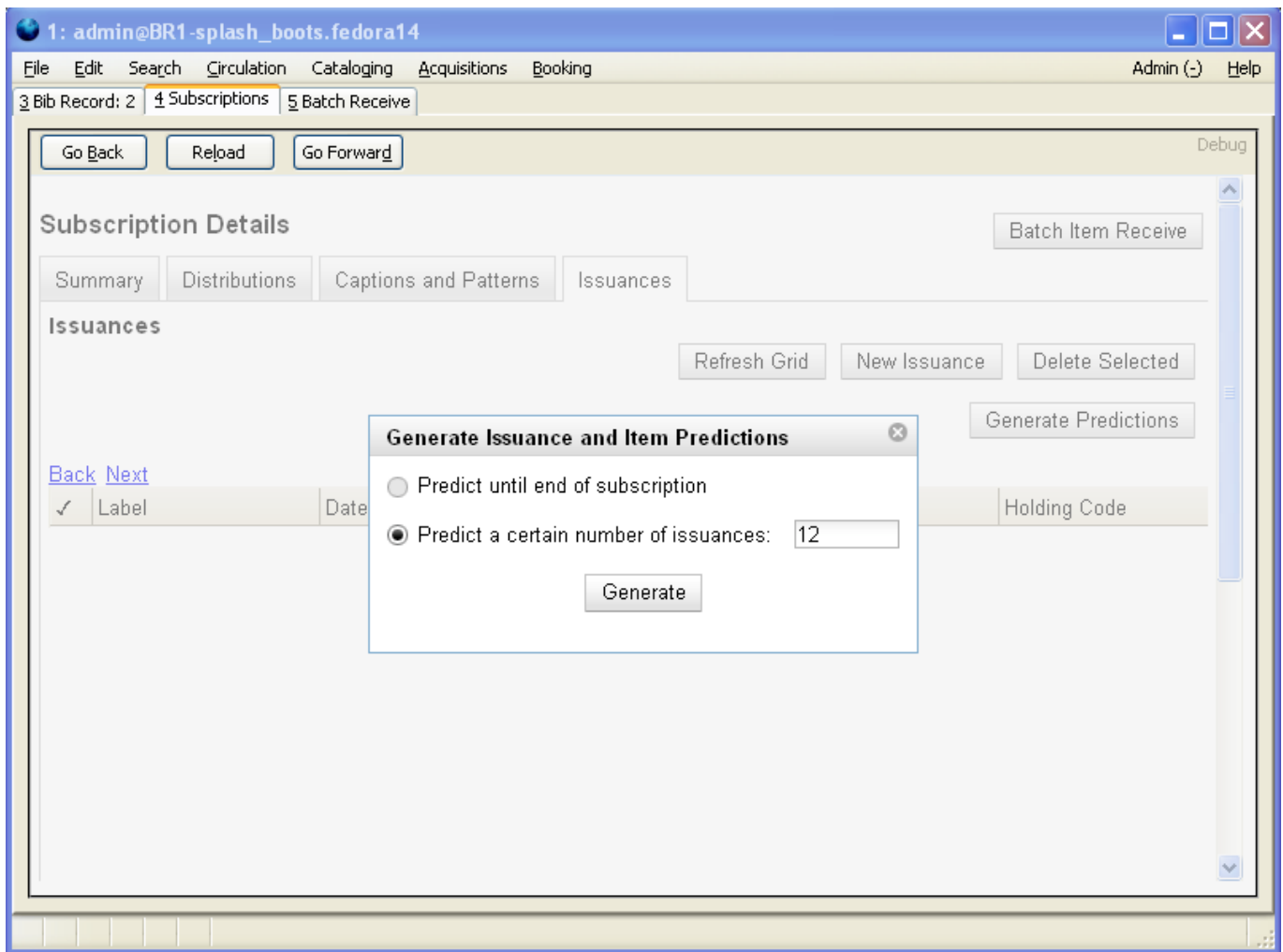
Caption Evaluation: Captions verified; all levels present

☒ Select frequency: Monthly

☐ Use number of issues per year:

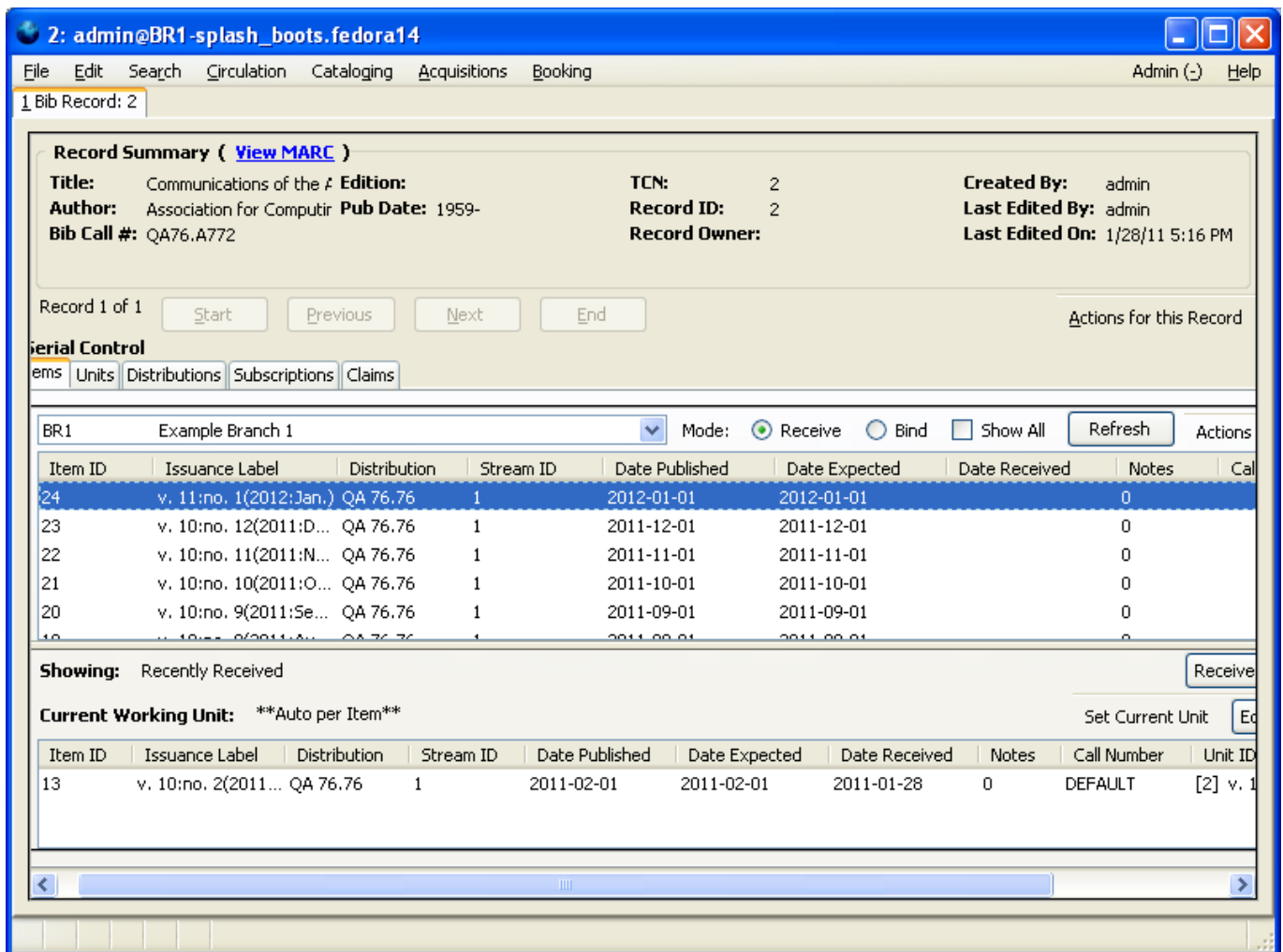
22 Serials - Predictions

- Once you have a pattern, you can generate predictions!



23 Serials - Check in

- Once you have predicted issues and created a copy template, you can receive serials



24 Serials - Missing in action

Some important functionality is still missing in action:

- Serials claiming has not yet been implemented
- Display of records with hundreds of barcoded issues is still a problem
 - Thankfully, Art Rhyno's [workaround](#) can be adapted to 2.x
 - New catalogue does a much better job of handling this situation
- Placing holds on specific issues is only available to staff by default; see also display of records with hundreds of barcoded issues

25 Cataloguing - Flat-text MARC editor

- Switch between flat-text MARC editor and classic editor on the fly

2: admin@BR1-splash_boots.fedora14

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Bib Record: 1

Record Summary (View MARC)

Title: The art of community	Edition: 1st ed.	TCN: 1	Created By: admin
Author: Bacon, Jonathan.	Pub Date: c2009	Record ID: 1	Last Edited By: admin
Bib Call #: TK5105.83.B33 2009	Record Owner:		Last Edited On: 1/28/11 4:05 PM

Record 1 of 1 Actions for this Record

Options

☐ Stack subfields ☒ Flat-Text Editor ☐ Fast Item Add

```
=LDR 01876cam a22003737a 4500
=001 1
=003 TEST
=005 20110128210505.0
=008 100224s2009\\$a\\$b\\$c\\$d\\$e\\$f\\$g\\$h\\$i\\$j\\$k\\$l\\$m\\$n\\$o\\$p\\$q\\$r\\$s\\$t\\$u\\$v\\$w\\$x\\$y\\$z\\$aa\\$ab\\$ac\\$ad\\$ae\\$af\\$ag\\$ah\\$ai\\$aj\\$ak\\$al\\$am\\$an\\$ao\\$ap\\$aq\\$ar\\$as\\$at\\$au\\$av\\$aw\\$ax\\$ay\\$az\\$ba\\$bb\\$bc\\$bd\\$be\\$bf\\$bg\\$bh\\$bi\\$bj\\$bk\\$bl\\$bm\\$bn\\$bo\\$bp\\$bq\\$br\\$bs\\$bt\\$bu\\$bv\\$bw\\$bx\\$by\\$bz\\$ca\\$cb\\$cc\\$cd\\$ce\\$cf\\$cg\\$ch\\$ci\\$cj\\$ck\\$cl\\$cm\\$cn\\$co\\$cp\\$cq\\$cr\\$cs\\$ct\\$cu\\$cv\\$cw\\$cx\\$cy\\$cz\\$da\\$db\\$dc\\$dd\\$de\\$df\\$dg\\$dh\\$di\\$dj\\$dk\\$dl\\$dm\\$dn\\$do\\$dp\\$dq\\$dr\\$ds\\$dt\\$du\\$dv\\$dw\\$dx\\$dy\\$dz\\$ea\\$eb\\$ec\\$ed\\$ee\\$ef\\$eg\\$eh\\$ei\\$ej\\$ek\\$el\\$em\\$en\\$eo\\$ep\\$eq\\$er\\$es\\$et\\$eu\\$ev\\$ew\\$ex\\$ey\\$ez\\$fa\\$fb\\$fc\\$fd\\$fe\\$ff\\$gg\\$gh\\$gi\\$gj\\$gk\\$gl\\$gm\\$gn\\$go\\$gp\\$gq\\$gr\\$gs\\$gt\\$gu\\$gv\\$gw\\$gx\\$gy\\$gz\\$ha\\$hb\\$hc\\$hd\\$he\\$hf\\$hg\\$hh\\$hi\\$hj\\$hk\\$hl\\$hm\\$hn\\$ho\\$hp\\$hq\\$hr\\$hs\\$ht\\$hu\\$hv\\$hw\\$hx\\$hy\\$hz\\$ia\\$ib\\$ic\\$id\\$ie\\$if\\$ig\\$ih\\$ii\\$ij\\$ik\\$il\\$im\\$in\\$io\\$ip\\$iq\\$ir\\$is\\$it\\$iu\\$iv\\$iw\\$ix\\$iy\\$iz\\$ja\\$jb\\$jc\\$jd\\$je\\$jf\\$jg\\$jh\\$ji\\$jj\\$jk\\$jl\\$jm\\$jn\\$jo\\$jp\\$jq\\$jr\\$js\\$jt\\$ju\\$jv\\$jw\\$jx\\$jy\\$jz\\$ka\\$kb\\$kc\\$kd\\$ke\\$kf\\$kg\\$kh\\$ki\\$kj\\$kk\\$kl\\$km\\$kn\\$ko\\$kp\\$kq\\$kr\\$ks\\$kt\\$ku\\$kv\\$kw\\$kx\\$ky\\$kz\\$la\\$lb\\$lc\\$ld\\$le\\$lf\\$lg\\$lh\\$li\\$lj\\$lk\\$ll\\$lm\\$ln\\$lo\\$lp\\$lq\\$lr\\$ls\\$lt\\$lu\\$lv\\$lw\\$lx\\$ly\\$lz\\$ma\\$mb\\$mc\\$md\\$me\\$mf\\$mg\\$mh\\$mi\\$mj\\$mk\\$ml\\$mm\\$mn\\$mo\\$mp\\$mq\\$mr\\$ms\\$mt\\$mu\\$mv\\$mw\\$mx\\$my\\$mz\\$na\\$nb\\$nc\\$nd\\$ne\\$nf\\$ng\\$nh\\$ni\\$nj\\$nk\\$nl\\$nm\\$nn\\$no\\$np\\$nq\\$nr\\$ns\\$nt\\$nu\\$nv\\$nw\\$nx\\$ny\\$nz\\$oa\\$ob\\$oc\\$od\\$oe\\$of\\$og\\$oh\\$oi\\$oj\\$ok\\$ol\\$om\\$on\\$oo\\$op\\$oq\\$or\\$os\\$ot\\$ou\\$ov\\$ow\\$ox\\$oy\\$oz\\$pa\\$pb\\$pc\\$pd\\$pe\\$pf\\$pg\\$ph\\$pi\\$pj\\$pk\\$pl\\$pm\\$pn\\$po\\$pp\\$pq\\$pr\\$ps\\$pt\\$pu\\$pv\\$pw\\$px\\$py\\$pz\\$qa\\$qb\\$qc\\$qd\\$qe\\$qf\\$qg\\$qh\\$qi\\$qj\\$qk\\$ql\\$qm\\$qn\\$qo\\$qp\\$qq\\$qr\\$qs\\$qt\\$qu\\$qv\\$qw\\$qx\\$qy\\$qz\\$ra\\$rb\\$rc\\$rd\\$re\\$rf\\$rg\\$rh\\$ri\\$rj\\$rk\\$rl\\$rm\\$rn\\$ro\\$rp\\$rq\\$rr\\$rs\\$rt\\$ru\\$rv\\$rw\\$rx\\$ry\\$rz\\$sa\\$sb\\$sc\\$sd\\$se\\$sf\\$sg\\$sh\\$si\\$sj\\$sk\\$sl\\$sm\\$sn\\$so\\$sp\\$sq\\$sr\\$ss\\$st\\$su\\$sv\\$sw\\$sx\\$sy\\$sz\\$ta\\$tb\\$tc\\$td\\$te\\$tf\\$tg\\$th\\$ti\\$tj\\$tk\\$tl\\$tm\\$tn\\$to\\$tp\\$tq\\$tr\\$ts\\$tt\\$tu\\$tv\\$tw\\$tx\\$ty\\$tz\\$ua\\$ub\\$uc\\$ud\\$ue\\$uf\\$ug\\$uh\\$ui\\$uj\\$uk\\$ul\\$um\\$un\\$uo\\$up\\$uq\\$ur\\$us\\$ut\\$uu\\$uv\\$uw\\$ux\\$uy\\$uz\\$va\\$vb\\$vc\\$vd\\$ve\\$vf\\$vg\\$vh\\$vi\\$vj\\$vk\\$vl\\$vm\\$vn\\$vo\\$vp\\$vq\\$vr\\$vs\\$vt\\$vu\\$vv\\$vw\\$vx\\$vy\\$vz\\$wa\\$wb\\$wc\\$wd\\$we\\$wf\\$wg\\$wh\\$wi\\$wj\\$wk\\$wl\\$wm\\$wn\\$wo\\$wp\\$wq\\$wr\\$ws\\$wt\\$wu\\$wv\\$ww\\$wx\\$wy\\$wz\\$xa\\$xb\\$xc\\$xd\\$xe\\$xf\\$xg\\$xh\\$xi\\$xj\\$xk\\$xl\\$xm\\$xn\\$xo\\$xp\\$xq\\$xr\\$xs\\$xt\\$xu\\$xv\\$xw\\$xx\\$xy\\$xz\\$ya\\$yb\\$yc\\$yd\\$ye\\$yf\\$yg\\$yh\\$yi\\$yj\\$yk\\$yl\\$ym\\$yn\\$yo\\$yp\\$yq\\$yr\\$ys\\$yt\\$yu\\$yv\\$yw\\$yx\\$yy\\$yz\\$za\\$zb\\$zc\\$zd\\$ze\\$zf\\$zg\\$zh\\$zi\\$zj\\$zk\\$zl\\$zm\\$zn\\$zo\\$zp\\$zq\\$zr\\$zs\\$zt\\$zu\\$zv\\$zw\\$zx\\$zy\\$zz\\$0\\$1\\$2\\$3\\$4\\$5\\$6\\$7\\$8\\$9\\$A\\$B\\$C\\$D\\$E\\$F\\$G\\$H\\$I\\$J\\$K\\$L\\$M\\$N\\$O\\$P\\$Q\\$R\\$S\\$T\\$U\\$V\\$W\\$X\\$Y\\$Z\\$a\\$b\\$c\\$d\\$e\\$f\\$g\\$h\\$i\\$j\\$k\\$l\\$m\\$n\\$o\\$p\\$q\\$r\\$s\\$t\\$u\\$v\\$w\\$x\\$y\\$z\\$0\\$1\\$2\\$3\\$4\\$5\\$6\\$7\\$8\\$9\\$A\\$B\\$C\\$D\\$E\\$F\\$G\\$H\\$I\\$J\\$K\\$L\\$M\\$N\\$O\\$P\\$Q\\$R\\$S\\$T\\$U\\$V\\$W\\$X\\$Y\\$Z
```

26 Cataloging - Classification and call numbers

- Configurable classification scheme defines default call number selection per library (Dewey, LC, and generic out of the box)
- Spine labels
 - Configurable call number prefix & suffix per shelving location
 - Configurable font and label sizes per library
- 2.1 adds call number prefixes and suffixes per call number

27 Copy location editor

2: admin@BR1-splash_boots.fedora14

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Copy Locations Editor

Go Back Reload Go Forward Debug Print Page

Copy Locations Editor

Welcome admin

Create a new copy location

Name:	<input type="text"/>	Holdable:	Yes <input type="radio"/> No <input checked="" type="radio"/>
OPAC Visible:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Circulate:	Yes <input type="radio"/> No <input checked="" type="radio"/>
Hold Verify:	Yes <input type="radio"/> No <input checked="" type="radio"/>	Owning Library	CONS <input type="button" value="v"/>

Focus Location: BR1

Name:	Owning Library	Holdable	Hold Verify	OPAC Visible	Circulate	Label prefix	Label suffix	Edit	Delete
Reference <input type="button" value="Translate"/>	CONS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	REF		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
<input type="text" value="Reference"/>	CONS	Yes <input type="radio"/> No <input checked="" type="radio"/>	Yes <input type="radio"/> No <input checked="" type="radio"/>	Yes <input checked="" type="radio"/> No <input type="radio"/>	Yes <input checked="" type="radio"/> No <input type="radio"/>	REF <input type="text"/>	<input type="text"/>	<input type="button" value="Submit"/>	<input type="button" value="Cancel"/>
Stacks <input type="button" value="Translate"/>	CONS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

28 Spine label editor

2: admin@BR1-splash_boots.fedora14

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Bib Record: 1 2 Spine Labels

Re-Generate Preview and Print

Font size (in points): 10

Font weight ("normal" or "bold"): normal

Spine Label

Left Margin (in characters): 0

Label Width (in characters): 8

Label Length (in lines): 9

Pocket Label

☐ Enabled

Middle Margin (in characters): 2

Label Width (in characters): 28

Label Length (in lines): 9

☒ Include Title (wraps on word at label width) On line: 4

☒ Include Title (segment after wrapping) On line: 5

☒ Indent a space?

☒ Include Author On line: 3

☒ Include Call Number On line: 2

☐ Include Owning Library (policy code) On line:

☐ Include Owning Library On line:

☐ Include Shelving Location On line:

☒ Include Item Barcode On line: 1

TK5105.83.B33 2009

1 copy

REF
TK
5105.83
.B33
2009

29 Circulation - Patron registration

- Register a patron in a single screen (seven screens prior to 2.0!)

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Register Patron

Reload Debug Print Page

Barcode	1234	Replace Barcode
OPAC/Staff Client User Name	dscott	<div>Save Save & Clone</div> Show All Fields
Password	4321	
Verify Password	4321	
First Name	Dan	
Last Name	Scott	
Primary Identification Type	Other	
Home Library	BR1	
Main (Profile) Permission Group	Patrons	
Privilege Expiration Date	2/1/2014	
Internet Access Level	Unfiltered	
Hold is behind Circ Desk	<input type="checkbox"/>	
Address		Mailing <input checked="" type="radio"/> Billing <input checked="" type="radio"/> <input type="button" value="X"/>
Type	MAILING	
Postal Code		

30 Circulation - Rules

File Edit Search Circulation Cataloging Acquisitions Booking Admin

1 Circulation Policies

Go Back Reload Go Forward Debug Print Page

Circulation Policy Configuration

[Back](#) [Next](#)

New

Org Unit	BR1
Active?	<input checked="" type="checkbox"/>
Permission Group	Patrons
Circulation Modifier	Book
MARC Type	
MARC Form	
Videorecording Format	
Circulate?	<input checked="" type="checkbox"/>
Copy Circ Lib	
Copy Owning Lib	
Duration Rule	28_days_2_renew
Hard Due Date	
Max Fine Rule	default
Minimum Available Copy/Hold Ratio	
Minimum Total Copy/Hold Ratio	

- Staff client interface for defining duration and fine rules based on criteria including:
 - item circulation modifier
 - item type, format, videorecording format
 - owning library
 - circulating library
 - reference state
 - type of patron
 - age of patron
- **2.1:** Grace periods can be defined per rule, instead of current global '*0 or 1 fine intervals*'
- **2.1:** Improved support for fine calculations for intervals of less than 1 day

31 Circulation - Multi-item sets

- **Missing in 2.0:** ability to catalogue multiple items as a single set (for example, *Play harmonica today!* consisting of a book, CD, and harmonica)
 - Current workaround is to assign just a single barcode to the complete set
 - **2.1** brings multi-item set support
 - Some support, via **Mark Missing Pieces** at check-in (albeit for only a single barcode)
 - Changes item status to '*Damaged*'
 - Prints an item slip
 - Prints a notification letter
 - Adds a note to the patron's record
 - Item remains checked out to patron's account until resolved
-

32 Circulation - Mark Missing Pieces

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Patron: Scott, Dan 2 Item Check In

Check In or Process Item

Check In

Enter Barcode: Submit Effective Date: 02/ 01/ 2011 Actions for Selected

Barcode	Checkin Date	Family Name	Finish	Location	Start	Title
123412341234	2/1/11 2:05 PM	Scott	2/1/11 2:05	Stacks	2/1/11 2:0...	Play harmonica
123413241234						

- Copy to Clipboard
- Add to Item Bucket
- Show in Catalog
- Show Item Details
- Show Last Few Circulations
- Retrieve Last Patron who circulated item
- Edit Item Attributes
- Backdate Post-Checkin
- Mark Item Damaged
- Mark Item as Missing Pieces
- Abort Transit
- Print Spine Label
- Save Columns

List Actions Print List (asynchronous) ☐ Strict Barcode Checkin Modified

33 Circulation - Missing pieces (confirm and note)

Mark Missing Pieces

Mark these items as missing pieces? Barcodes: 123412341234

Options

OK

Cancel

Copy Message

Apply Standing Penalty/Message Notes, Alerts, Blocks

Note
Alert
Block

↕

Missing the harmonica.

Cancel

Apply

34 Circulation - Missing pieces patron note

File Edit Search Circulation Cataloging Acquisitions Booking
Admin (-) Help

1 Patron: Scott, Dan
2 Item Check In

Scott, Dan

(Invalid Date of Birth)

Status
 Patrons
 BR1
 Internet Unfiltered
 Expires on 2/1/14

Holds: 0

Available: 0

Bills: \$ 0.00

Check Outs: 1

Overdue: 0

Long Overdue: 0

Claimed Returned: 0

Lost: 0

Non Cataloged: 0

ID and Contact Information
 Library Card: 1234
 ID 1: Other
 ID 2:
 Holds Alias:

Staff-Generated Penalties/Messages

Apply Standing Penalty/Message
Actions for these Penalties/Messages ▾

Applied On	Label	Note
2/1/11 2:09 PM	Note, no blocks	Missing the harmonica.

Archived Penalties/Messages

Start Date: 02/01/2010
End Date: 02/01/2011
Retrieve

Applied On	Label	Library	Note
------------	-------	---------	------

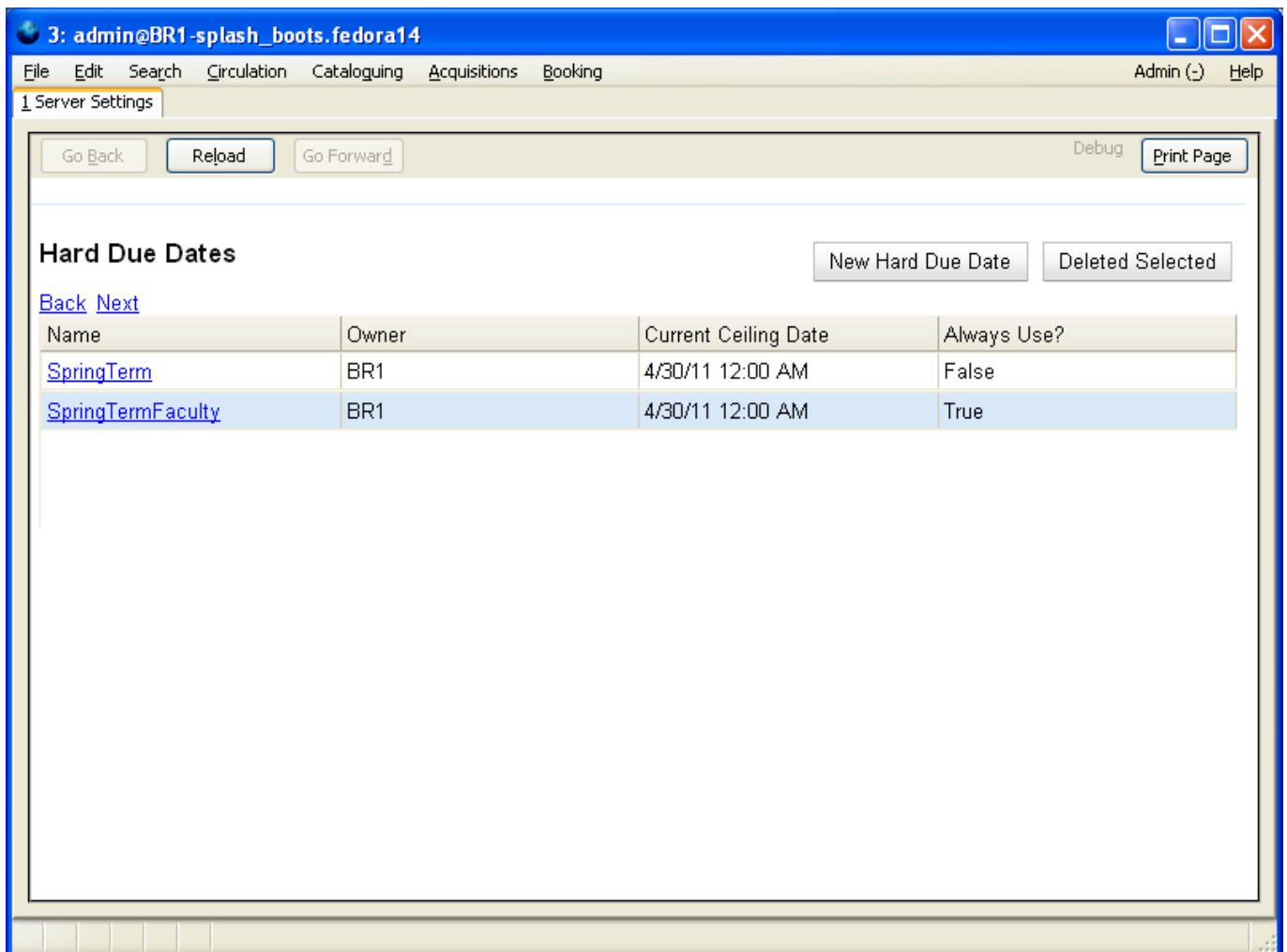
35 Circulation - Bound-withs

- The inverse of the multi-part item is two or more separate works bound together in a single item. For example:
 - Collections of pamphlets in a single bound volume

- *tête-bêche* - popular for Canadian bilingual government documents
- Thousands of books on a single e-reader
- **Missing:** Evergreen currently provides no support for separate bibliographic records that can be linked to a single barcode
 - **2.1** brings bound-with set support

36 Circulation - Hard due dates

- Most loan durations are expressed as an interval of time ("2 weeks", "4 hours")
- Academics needed a way to set "End of term" due dates, so now hard due dates enable you to
 - Set a *ceiling* for regular loan durations
 - Or set due dates for all affected items to the hard due date



37 Circulation - Holds

- Optional first-in, first algorithm (**new**) vs. classic "minimize transit distance" algorithm
- Patrons can:

- See estimated wait time, hold queue details
- Cancel and recreate holds
- Change pickup location before the hold is ready for pickup
- Place holds on on-order items
- Create holds from bookbags (*KCLS skin?*)
- Staff can:
 - Add custom notes to hold slips
 - Force a patron to the front of the queue (for example, if the held item was damaged)
- System can be configured to disallow holds for items that are on the shelf

38 Circulation - Notifications

- Out of the box, email, print, and telephone notification is supported (Asterisk PBX server not included)
- Pre-defined events that trigger notification include:
 - Holds are available or expiring
 - Pre-overdue reminders
 - Items are overdue or marked as lost
 - Password resets
 - Self-checkout receipts
 - Results of a patron request (ordered, received, cancelled, rejected)

39 Booking / reservations

- If you have all items of a reservable type attached to a single bibliographic record, the booking module can help
 - "Video Projector", "Study Room", "Laptop", etc
 - Staff can reserve items on behalf of patrons for time slots in the future
 - Limitation: Reserved items are "picked up" by patrons, rather than checked out
 - Does not count as a circulation
 - Does not trigger circulation rules
-

40 Booking - Create reservation

Machine Devices Help

1: admin@BR1-elephant.acq.open-ils.org

File Edit Search Circulation Cataloguing Acquisitions Booking Admin (-) Help

1 Reservations 2 Patron Search 3 Item Check In

LCD projector

12341237
12341236

Reserve to patron barcode: 021bb75253b79e2ec12

Choose the pickup library for this reservation:
BR1

Reserve Selected Reserve Any

I need this resource...

Between
4/12/2011 21:00

and
4/12/2011 23:00

22:00
22:15
22:30
22:45
23:00
23:15

Existing reservations for System Account, Administrator:

Type	Resource	Start time	End time
------	----------	------------	----------

Right Ctrl

41 Booking - Capture reservation

Machine Devices Help

1: admin@BR1-elephant.acq.open-ils.org

File Edit Search Circulation Cataloguing Acquisitions Booking Admin (-) Help

1 Booking Capture 2 Patron Search 3 Item Check In

Capture Reserved Resources

Enter barcode:

Capture Information

This item need to be routed to **RESERVATION SHELF**:
Barcode: 12341236
Title: LCD projector
Author: BenQ

Reserved for patron System Account, Administrator
Barcode: e08e7089a77e6021bb75253b79e2ec12

Request time: 2011-04-03 16:02
Reserved from: 2011-04-18 16:01 - 2011-04-18 17:00

Slip date: Sun Apr 3 23:50:13 2011
Printed by System Account, Administrator at BR1

Right Ctrl

42 Booking - Pick up reservation

Machine Devices Help

1: admin@BR1-elephant.acq.open-ils.org

File Edit Search Circulation Cataloguing Acquisitions Booking Admin (-) Help

1 Reservation Pickup 2 Patron Search 3 Item Check In

Reservations Pickup

Enter patron barcode: 0021bb75253b79e2ec12 Go

System Account, Administrator

Patron has these reservations ready for pickup:

Title	Barcode	Start time	End time
LCD projector	12341236	2011-04-11 15:58	2011-04-11 17:00
LCD projector	12341237	2011-04-11 16:02	2011-04-11 17:00
LCD projector	12341236	2011-04-18 16:01	2011-04-18 17:00

Pick up

Patron currently has these reservations out:

Patron has no more reservations out at this time.

Clear / New Patron

43 Circulation - Other

- Sets of items
- Transaction logging (who accepted payment for what?)
- Merge patrons
- Delete patrons (anonymizing all transaction history)
- Amnesty mode
- Built-in self-check supports credit card payments (Canadian usage unknown)
- Backdated check-ins retain actual check-in time as well as backdate
- **Missing:** Built-in academic reserves
 - University of Windsor has implemented and adopted **Syrup** reserves system

44 Acquisitions

- In preview mode since 1.6.0, acquisitions has been unleashed in 2.0.0:
 - Funding sources and funds
 - Multiple currencies and exchange rates
 - Provider (vendor) management

45 Acquisitions - Funding sources

The screenshot displays the 'Acquisitions' module in Evergreen 2.x, specifically the 'Funding Sources' section. The interface includes a menu bar at the top with options: File, Edit, Search, Circulation, Cataloging, Acquisitions, Booking, Admin (-), and Help. Below the menu is a tab labeled '1 Server Settings'. The main content area has buttons for 'Go Back', 'Reload', 'Go Forward', 'Debug', and 'Print Page'. The 'Funding Sources' section contains a table with columns: Funding Source Name, Owner, Code, Currency, and balance. One row is visible: 'Annual budget' with Owner 'BR1', Code 'BUDGET', Currency 'Canadian Dollars', and balance '0'. A modal dialog is open for editing a funding source, with fields for 'Funding Source Name' (Donations), 'Owner' (BR1), 'Code' (DONATIONS), and 'Currency' (Canadian Dollars). The dialog also has 'Cancel' and 'Save' buttons.

✓	Funding Source Name	Owner	Code	Currency	balance
<input type="checkbox"/>	Annual budget	BR1	BUDGET	Canadian Dollars	0

Funding Source Name

Donations

Owner

BR1

Code

DONATIONS

Currency

Canadian Dollars

Cancel

Save

46 Acquisitions - Funds

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Server Settings

Go Back Reload Go Forward Debug Print Page

Funds New Fund Delete Selected Fund Propagation & Rollover ▾

Context Org Unit BR1

Back Next

✓	Name	Code	Year
<input type="checkbox"/>	English	ENGL	2011

Name	Français
Code	FRA
Year	2011
Org Unit	BR1 ▾
Currency Type	Canadian Dollars ▾
Active	<input checked="" type="checkbox"/>
Balance Stop Percent	25
Balance Warning Percent	15
Propagate	<input type="checkbox"/>
Rollover	<input type="checkbox"/>
Cancel	Save

Balance Warning Percent	Propagate	Rollover
	False	False

47 Acquisitions - Providers

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Server Settings

Go Back Reload Go Forward Debug Print Page

Provider New Provider Delete Selected

Back Next

✓	▼ Provider Name	Code	Owner	Currency	Active	Default Claim Policy	EDI Default	Email	Fax Phone	Holdings Tag	Phone	Prepayment Required	SAN	URL
<input type="checkbox"/>	Jungle Books	Jungle	BR1	Canadian Dollars	True			junglebo			555-555	False		http://
<input type="checkbox"/>	Aubergine	AUBERG	BR1	Canadian Dollars	True			auberge			555-555	False		

48 Acquisitions - Ordering

- There are a number of ways of ordering in Evergreen:
 - Manually creating selection lists and invoices
 - Generating an EDI ORDERS message (the provider's ORDRSP can be used to update price and status information)
 - Using the provider's selection interface and loading their MARC order records
- EDI has been tested so far with:
 - Baker & Taylor
 - Brodart
 - Midwest Tapes
 - Ingram
- Documentation on how to use most of the advanced features in acquisitions is [now available](#)

49 Integration

- Z39.50 client for copy cataloguing
- SRU and Z39.50 server interfaces for external clients
- SIP server support for self-checkout and authentication
- OpenURL support:
 - **Basic SFX target parser**
 - Cached SFX lookups for electronic resource display in search results (post-2.0 but available now)
- **Missing:** ability to delegate authentication to an external service (LDAP, OpenID, Shibboleth, etc)

50 Documentation

- Team co-led by Robert Soulliere at Mohawk College has produced **a solid draft for 1.6.0**
 - Full HTML and PDF versions available
- Staff client supports separate help page for each staff client interface
- **In progress:**
 - 2.0 documentation
 - Actual help content for staf client

51 Independence and governance

- Development team features a more diverse mix of active committers:
 - Currently 4/9 from outside of Equinox (arguably 2/7)
- Increasing quantity of patches contributed by, and bugs opened and answered by, the community
- Community has self-organized into a number of ad-hoc teams / committees:
 - Developer team
 - Communications / Web team
 - Documentation team
 - Reports committee
 - Conference committee
- Governance committee was struck at the 2010 Evergreen Conference
 - Currently working on forming a fiscal sponsorship agreement with the **Software Freedom Conservancy**
 - Has also held healthy debates about how the governance committee should renew itself, what membership means, etc

52 Upgrade to 2.x: schedule

Goal for May: upgrade to newest version of Evergreen without loss of existing functionality

Now → end of May	Testing and (re)training with 2.x functionality
Friday, April 8th	Upgrade test server to 2.0.5
Friday, April 15th	Port catalogue skins to 2.0.x
Wednesday, April 20th	Upgrade test server to 2.1 beta
Week of April 25th	Evergreen Conference
Week of May 2nd	Port circulation rules to 2.1 (in-database)
Week of May 16th	Final testing: public interface, circulation, cataloguing
Weekend of May 20th	Upgrade to 2.1
Weekend of May 27th	Contingency: Upgrade to 2.1

53 Communication

- Conifer is a consortium, not a set of individual libraries
- Preference is to discuss first and get it right once across most or all libraries
- Channels:
 - Many-to-many: [Conifer discussion list](#)
 - Many-to-many (specialized): Circulation / Cataloguing / Public interface groups
 - One-to-many: [Conifer tickets](#)
 - One-to-one: Contact individual Conifer systems person
- * Perfectly appropriate for **SYSTEM IS DOWN!**

54 Testing - Circulation

- Rules calculate fines correctly for most common categories
- Scheduled reports continue to provide accurate (or more accurate) information
- Reminder / overdue notices generated appropriately for all languages
- Item history / patron history
- Fine payments
- Fields that we have hidden locally (date of birth, internet filtering) should stay hidden
- **New:** Set due time as well as due date
- **New:** Ensure *Renew items* interface works correctly
- **New:** Adopt bookings / reservations at some locations?

55 Testing - Cataloguing

- Located URIs for electronic resources
 - Ingest multiple URIs successfully
 - Remove URIs and reingest to enable deleting a record
- Spine labels
 - Printing still works

- **New** Set per-library formatting defaults
- **New** Prefixes / suffixes by shelving location
- Call numbers
 - **New** Default to LC or Dewey on a per-library basis
 - **New** Improved call number sorting
- Serials
 - Raw MFHD approach still works
 - **New** User-friendly predictions and check-ins
- **New** Authorities management and use

56 Testing - Public interface

- Display URI / call number / location / availability in search results
- SFX lookups
- Local branding in skins
- French / English interfaces
- Zotero support
- Keyword / title / author / subject / series searches (including phrases)
- **New** Advanced search options
 - Boolean OR
 - Wildcard * truncation operator
 - Identifier indices

57 Testing - System integration

- RACER integration
 - Accurate ISSN / ISBN search via Z39.50
- Self-check machines
 - Supports Unicode characters in patron names / item metadata

58 Summer projects

- Automate synchronization of Laurentian user information
 - Depends heavily upon Information Technology Services, the gatekeepers to this information
 - We have worked out a technical path to synchronize user accounts, including name, email address, contact information, password, program and enrolment status
 - In-database circulation:
-

- First, adopt it at time of upgrade (converting existing scripted rules to in-database logic)
 - Second, enable local administrators to adjust their rules according to local requirements
 - "Syrup" reserves:
 - Continue to encourage faculty to link to electronic resources from Desire2Learn
 - If time allows, set up a limited Syrup instance for Laurentian to support physical resources
 - Acquisitions:
 - No urgent need at J.N. Desmarais to adopt Evergreen acquisitions
 - Could begin by loading last few years of acquisitions history, then load current year one month at a time until cut over?
 - New pure HTML catalogue (speed and stability)
 - Some significant differences in applying local customizations
 - Discovery
 - Contribute on an as-needed basis to Windsor's "single search" effort for searching all electronic and print resources from one search box
 - Update of union catalogues (AMICUS, WorldCat, ...)
-