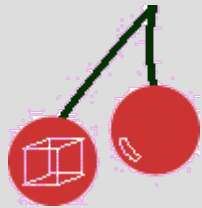


Evergreen Open-ILS



Cary Gordon, MLS
The Cherry Hill Company
<http://www.chillco.com>

Presentation URL:

<http://www.chillco.com/evergreen>

What does Evergreen do?

- What modules or components are available?
 - circulation
 - cataloging
 - web catalog
 - statistical reporting
- Evergreen also supports the SIP2 protocol for self-check and Internet/computer access control.

What is next?

- Evergreen's Acquisitions and Serials modules are currently under joint development with the University of Windsor.
- Other features on the roadmap include a Z39.50 server, telephony and credit card support.

What will it do?

- Full I18N
- OPAC enhancements
- Java client support
- Simpler index configuration
- Full NACO-normalized authority linking and tracing
- Hold freezing
- Faceting and new browse interfaces
- Exposing of the advanced search syntax

Features

- Flexible representation of the organization hierarchy allows you to go as deep or as wide as needed with expressing tree-like relationships between physical and political locations.
- Designed for large consortia, the system can scale down to single libraries and library systems.

Features

- Fine-grained permission system for groups and users allows administrators to set the balance between ease of use and strict control and accountability.
- Permissions may also have a depth parameter, allowing them to be positioned in an organizational hierarchy.

Features

- Separation of orthogonal information.
- To the degree possible, eliminate the overloading of concepts and fields, to reduce or eliminate the need for such things as dummy users, dummy records, etc.

Circ Features

- At a glance patron summary saves you from switching needlessly between multiple windows.

Simpson, Homer

Refresh

Check Out

Items Out

Hold

Bills

Edit

Info

Exit

(Alert) (See Notes) (Max Bills) (Has Bills) (Has Overdues)

Alert

Uses doughnuts as bookmarks. Ewwwwwww!

Status

Patron
STRL-SBORO
Internet: Filtered
Expires on 2009-08-04

Holds: 0
Available: 0
Bills: \$42.45
Check Outs: 2
Overdue: 2
Long Overdue: 0
Claimed Returned: 0
Lost: 1
Non Cat: 0

ID/Contact Info

PINES Card: [homerscard](#)
ID 1: Drivers Licence

Items Out

Actions for Selected Items

Barcode	Checkout Lib	Circ Lib	Due Date	Fines Stopped	Remaining Renewals	Title	
310570019...	STRL-SBORO	WGRL-DC	2006-09-15	MAXFINES	0	Gardening wi...	
310530001...	STRL-SBORO	STRL-SBO...	2006-09-15	MAXFINES	1	Doughnut da...	

Show Non-Cataloged Circulations in List Above

Print Receipt

Export

Lost / Claimed Returned / Long Overdue

Actions for Selected Items

Barcode	Checkin Date	Checkout Lib	Circ Lib	Fines Stopped	Title	
310460052734...		WGRL-DC	RML-MAIN	LOST	Babar's birthday surpr...	

Print Receipt

Export

Circ Features

- Library-defined statistical categories for patrons: You can define arbitrary fields and field entries to record patron information at any level of the organization hierarchy.
- These custom fields only appear where they apply.

Circ Features

- Notes and alert fields for patrons: You may annotate patron accounts with an unlimited number of notes, or set an alert message field that halts the circulation process on patron retrieval.
- Notes may also be made visible to patrons logged into the online catalog as a means of librarian to patron communication.

Circ Features

- Separation of patron accounts and library cards: Lost cards do not necessitate the re-registration or cloning of patron accounts, which allows for unbroken statistics and account history.

Circ Features

- Group management allows you to link patron accounts for such things as expressing familial relationships, and allows you to share canonical (edit in one place and it reflects everywhere) address information between patrons.

Circ Features

- Circulation of non-cataloged and pre-cataloged materials allows you to circulate and gather statistics on uncataloged items.
- Circulation statistics are preserved when a pre-cataloged item becomes cataloged.

Circ Features

- Customizable receipt printing based on templates (header, footer, and line item) allows you to tailor your receipts to your library policy.
- HTML support for printers with graphics support.

Templates

ID

Name

Type

Actions

Be sure to "Save Locally" before export

Preview

The following items have been examined:

1. Peace comes to Castle Oak
Barcode: 3635300990263
 2. The robber barons : the great American capitalists,
1861-1901
Barcode: 33207002163014
 3. Katy no-pocket
Barcode: 33034001434539
 4. King's Castle
Barcode: 31039000791757
 5. Katy no-pocket
Barcode: 33034001434539
-

BROOK-HQ 2007-10-28 19:54

Header

The following items have been examined:<hr/>

Line Item

 %title%

Barcode: %barcode%

Footer

 <hr /> %SHORTNAME% %TODAY_TRIM%

Circ Features

- Fine-grained control of bills with groupings and line-items
- Late charges are applied as they accrue, instead of being calculated for display.
- Payments can be applied to specific bills.
- If allowed, patrons can carry credit (pre-pay) on their accounts.

Summary

Net Balance 23.00
- Payment applied 0.00
= New Balance 23.00

Pay Bill

Payment Type Cash
Payment received 0.00
- Payment applied 0.00
= Change 0.00

Bill Patron

History

Annotate Payment

Auto-Print

Apply Payment!

Selected Balance: \$23.00 Un-Selected: \$0.00 Voided: \$0.00

Red Items are still Checked Out

Information	Money Summary	Current Payment
<input checked="" type="checkbox"/> Title: My life as a fifth-grade comedian Last Billing: Overdue materials <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed \$10.00 Total Paid \$2.60 Balance Owed \$7.40	0.00
<input checked="" type="checkbox"/> Title: How to draw SpongeBob SquarePants : 5 splashy styl Last Billing: Overdue materials <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed \$10.00 Total Paid \$2.70 Balance Owed \$7.30	0.00
<input checked="" type="checkbox"/> Title: Have board, will travel the definitive history of Last Billing: Overdue materials <input type="button" value="Full Details"/> <input type="button" value="Add Billing"/> <input type="button" value="Void All Billings"/>	Total Billed \$10.00 Total Paid \$1.70 Balance Owed \$8.30	0.00

Circ Features

- Customizable circulation rules for defining privileges based on library, patron, item, and bibliographic information.

Cataloging Features

- Library-defined statistical categories for items
-- fields may be defined at any level of the organization hierarchy.
- Eliminates the need to overload fields.

Statistical Category Editor

Welcome **brook-hq-demo-admin**

Create a new statistical category			
Enter the name:	<input type="text"/>	Owning Library:	PINES <input type="text"/>
Opac Visibility:	On <input type="radio"/> Off <input checked="" type="radio"/>	Type:	Patron <input type="text"/>
<input type="button" value="Create new stat cat"/>			

[Copy Stat Cats](#)[Patron Stat Cats](#)

* To edit or view information about an entry, click on the entry in the drop-down menu

Stat Cat Name	Owning Library	OPAC Visibility	Entries	Add Entry	Edit
Books at the Director's Home	PINES	Off	(none) <input type="text"/>	Add	Edit
Census Blocks	PINES	Off	(none) <input type="text"/>	Add	Edit
Check your technique, see if you can follow it	PINES	Off	(none) <input type="text"/>	Add	Edit
If you read this/check it	PINES	Off	in <input type="text"/>	Add	Edit
Primary Language	PINES	Off	Spanish <input type="text"/>	Add	Edit
Sports Readers	PINES	Off	(none) <input type="text"/>	Add	Edit
Storytime Members	PINES	Off	No <input type="text"/>	Add	Edit
cepuq	PINES	Off	UdeM <input type="text"/>	Add	Edit
microfilm use	PINES	Off	(none) <input type="text"/>	Add	Edit

Cataloging Features

- Unlimited notes for annotating items. These may be made visible in the online catalog.
- Alert message field on items for halting circulation activities.

Copy Editor

Templates:



Apply

Delete

Import

Export

Save

Reset

Identification

Status

Available 1 copy

Barcode

36142000606853 1 copy

Creation Date

2006-04-28 1 copy

Creator

admin 1 copy

Last Edit Date

2006-04-28 1 copy

Last Editor

admin 1 copy

Location (1)

Shelving Location

Adult 1 copy

Circulation Library

BROOK-HQ 1 copy

Owning Lib : Call Number

BROOK-HQ : F PYN 1 copy

Copy Number

1 1 copy

Circulation (2)

Circulate?

Yes 1 copy

Holdable?

Yes 1 copy

Age Protection

<Unset> 1 copy

Loan Duration

Short 1 copy

Fine Level

Low 1 copy

Circulate as Type

<Unset> 1 copy

Circulation Modifier

<Unset> 1 copy

Miscellaneous (3)

Alert Message

<Unset> 1 copy

Deposit?

No 1 copy

Deposit Amount

0.00 1 copy

Price

28.00 1 copy

OPAC Visible?

Yes 1 copy

Reference?

No 1 copy

Statistics (4)

PINES : Exam Proctor

<Unset> 1 copy

PINES : Gift

<Unset> 1 copy

PINES : Headphones

<Unset> 1 copy


PINES : test

<Unset> 1 copy

Copy Notes

Modify Copies

Close

 Add Note



New Note

Public?

Title

Note

Cancel

Add Note

Cataloging Features

- "Buckets" for grouping and sharing related items and bibliographic records.
- Track and work with your materials in arbitrary ways and more easily collaborate with others.

Item Status

36142000606853 --

Scan Item

Barcode:

Submit

Upload From File

Alert Message	Barcode	Call Number	Due Date	Location	Status
	36142000606853	F PYN		Adult	Avail

Actions for Catalogers

Actions for Selected Items

Copy to Clipboard
Add Items to Buckets
Show in Catalog
Show Item Details
Show Last Few Circulations

Edit Item Attributes
Transfer Items to Previously Marked Volume

Add Volumes
Mark Library as Volume Transfer Destination

Add Items
Edit Volumes
Mark Volume as Item Transfer Destination
Transfer Volumes to Previously Marked Library

Delete Items
Delete Volumes

Mark Item Damaged
Mark Item Missing

Print Item Spine Labels
Replace Barcode
Save Columns

Cataloging Features

- Record merging functionality in bibliographic buckets allows for side by side comparison of MARC records before merging.
- This helps in choosing lead records and helps prevent accidental merges.

Cataloging Features

- Batch Creation of Volumes/Copies across multiple branches.
- Eases central cataloging efforts and reduces errors.

Cataloging Features

- Move volumes and copies within and across records and volumes.
- Allows batch movement to specified targets.

Cataloging Features

- Customizable label printing based on templates.

Cataloging Features

- Z39.50 client for record import and overlay.
- Search and retrieve records from 3rd party sources.
- Authority Validation of MARC records.

Cataloging Features

- RSS feeds for record creation.
- Allows offline activity monitoring.

Web Catalog Features

- Google-like interface by default--provides familiarity and least surprise for patrons using the catalog with relevancy ranked search results.

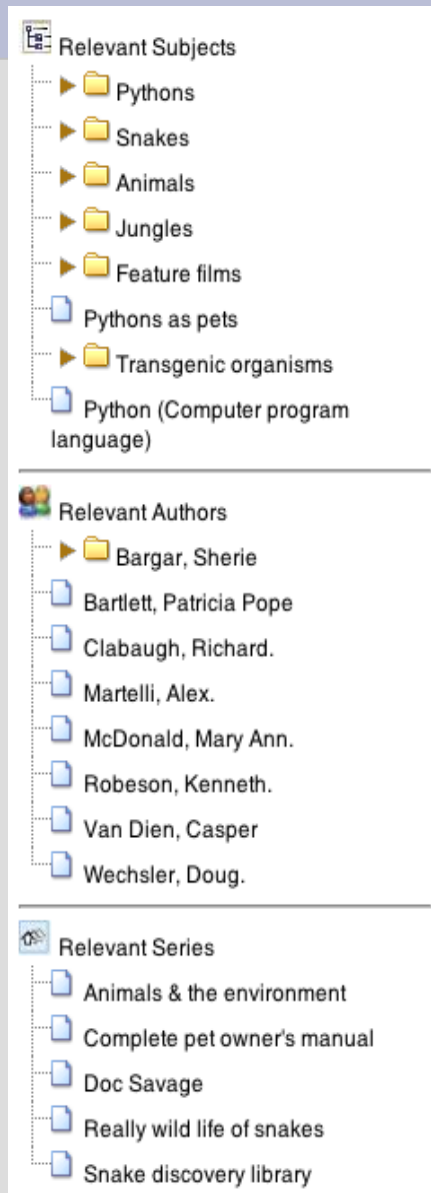
The screenshot displays the Evergreen web catalog interface. At the top, the logo "EVERGREEN™" is shown in green, with a stylized leaf icon between the words. Below the logo, a light green bar contains the text "Now Searching Vidalia-Toombs County Library". A search bar with a "Go!" button is positioned below this. Underneath the search bar are two dropdown menus: "Keyword" and "All Formats". At the bottom of the search area, there are links for "Advanced Search", a dropdown menu for "Choose a different library...", and "My Account". The footer contains navigation links: "Basic Catalog (HTML only)", "Find a Library Near Me", "Help", "About PINES", and "GALILEO". Below these links is the copyright notice "Copyright © 2006 Georgia Public Library Service" and the text "Powered by EVERGREEN™" with the Evergreen logo.

Web Catalog Features

- Stemmed and exact searches. "Did you mean?" feature based on authority data and a custom bibliographic dictionary helps avoid search failures.

The screenshot shows a search interface for the Vidalia-Toombs County Library. The search bar contains the text "zoup" and a "Go!" button. To the right of the search bar are three dropdown menus: "Keyword", "All Formats", and "All PINES Libraries". Below the search bar, the text "Vidalia-Toombs County Library Including results for PINES" is displayed. The main search results area is empty, and a message in the center states "Zero hits were returned for your search." Below this message, a suggestion is provided: "Maybe you meant: [soup](#)".

Web Catalog Features



The screenshot displays a sidebar with three sections: Relevant Subjects, Relevant Authors, and Relevant Series. Each section is separated by a horizontal line and contains a list of items with corresponding icons.

- Relevant Subjects**
 - ▶ Pythons
 - ▶ Snakes
 - ▶ Animals
 - ▶ Jungles
 - ▶ Feature films
 - Python (Computer program language)
 - Python as pets
 - ▶ Transgenic organisms
- Relevant Authors**
 - ▶ Bargar, Sherie
 - Bartlett, Patricia Pope
 - Clabaugh, Richard.
 - Martelli, Alex.
 - McDonald, Mary Ann.
 - Robeson, Kenneth.
 - Van Dien, Casper
 - Wechsler, Doug.
- Relevant Series**
 - Animals & the environment
 - Complete pet owner's manual
 - Doc Savage
 - Really wild life of snakes
 - Snake discovery library

- Related Subject, Author, and Series sidebars based on authority data and search results for exploring the catalog.

Web Catalog Features

- Integration with common web browsers, news aggregators, and search engines through RSS feeds, unAPI, OpenSearch semantics, and multiple XML and library formats for exporting data.
- Allows for library content to be pushed into areas outside the normal influence of libraries.


Web Catalog Features

- Plug-in support for "Added Content" vendors for providing such things as jacket cover images and reviews.

Web Catalog Features

- "Bookbags" allow patrons and librarians to group titles in arbitrary ways and share those groupings.

Text Size: Regular / Large

 **PINES**



Home
Advanced Search
My Account
Log out
You are logged in as **demo3**

Go! Keyword All Formats This Branch

Athens-Clarke County Library

Account Summary Items Checked Out Items on Hold Fines Account Preferences **My Bookbags**

My Bookbags

Name	# Items	Shared	Share / Hide	Delete this bookbag?
Good Reads	1 Items	Yes View 	Hide	Delete
Things To Keep Me Up Nights	2 Items	Yes View 	Hide	Delete
science	2 Items	No	Share	Delete

Create a new Bookbag

Enter the name of the new Bookbag:

Share this Bookbag (??) Yes No

Web Catalog Features

- "Metarecords" for grouping different formats and editions of the same work together.
- Allows for more concise search results and greater flexibility with placing holds on items.

Web Catalog Features

- "My Account" user services allows for such things as user initiated batch renewal, and the setting of notification options for holds.

Text Size: Regular / Large

EVERGREEN

Home
Advanced Search
My Account
Log out
You are logged in as 90909090

Vidalia-Toombs County Library

Go! Keyword All Formats This Branch

Account Summary	Items Checked Out	Items on Hold	Fines	Account Preferences	My Bookbags
-----------------	-------------------	---------------	-------	---------------------	-------------

Name	winkin blinkin nod	
Day Phone		
Evening Phone		
Other Phone		
Username	90909090	Change
Password	(not shown)	Change
Email Address	deadbeat@nowhere.nil	Change
Primary Identification	*****2345	
Active Barcode	90909090	
Home Library	Vidalia-Toombs County Library	
Account Creation Date	2007-10-27	

Addresses					
Address Type	Street	City	County	State	Zip
MAILING	123 fourth ave	lincoln	wachitoya	CA	99999

Statistical Reporting Features

- GUI based report builder--allows for point and click access to all fields in the database when constructing reports.
- No license fees for direct access to the database.
- The database and the data schema are both free and open source.

Core Technologies

- Database: PostgreSQL
- Logic/glue languages: C++ and Perl
- Webserver: Apache mod_perl
- Server operating system: Linux
- Server hardware: x86 64 bit
- Messaging core: Jabber
- Client side software: XUL (XULRunner)

- OpenSRF

Georgia PINES

- Public Information Network for Electronic Services
- *A program of the Georgia Public Library Service, Georgia Library PINES is the public library automation and lending network for 270 libraries in 133 counties. PINES creates a statewide "borderless library" that provides equal access to information for all Georgians.*

Other Users

- British Columbia consortium
- University of Windsor (Ontario) - Voyager
- Laurentian University (Ontario) – Sirsi
- Michigan Library Consortium / Grand Rapids
- King County Library System – III

(proof of concept study)

PINES Costs

- *Cost effectiveness:*
 - › *Estimate to replace automation systems in all PINES libraries: \$15 million*
 - › *Annual maintenance for Individual automation systems: \$5 million*
 - › *PINES annual operations: \$1.6 million*
 - › *Approximately \$1.00 per registered customer*
 - › *About 1/10 of the cost of purchasing individual automation systems*

PINES Services

- Service providers:
 - Equinox
 - LibLime
 - Me
- Community support:
 - Websites
 - Wiki
 - Trac
 - Mailing list
 - IRC channel
 - RSS Feeds