2016 Evergreen International Conference

Scholarship Reports

This packet contains reports written by the following PINES library staff members who were awarded scholarships by Georgia Public Library Service to attend the Evergreen International Conference in Raleigh, NC in April, 2016.

Kimberly Clayton, Clayton County Library System

Alisa Claytor, Athens Regional Library System

Jennifer Durham, Statesboro Regional Library System

Chantal Gunn, Augusta-Richmond County Public Library System

Sam Link, Greater Clarks Hill Regional Library System

Tangela McKibbens, Henry County Library System

Belle Reynoso, Clayton County Library System

Ceil Smith, Three Rivers Regional Library System

Linh Uong, Northeast Georgia Regional Library System

Having the opportunity to attend the Evergreen International Conference was extremely beneficial to me. Using Evergreen everyday sometimes causes you to fall in the rut of the same mundane activities that “get the job done”. Attending this conference opened my eyes to the different possibilities that are available beyond the conventional uses. Being able to have a look into the back-end, inner workings of the software was fascinating and enlightening. As a rising IT professional, attending Chris’s report talk and the SQL for Human’s session not only helped me understand the structure of EG and how things work like they do but also helped me in a general professional manner. Some of the information that was shared will be invaluable as I go about the days in the Library. Although I didn’t stick to one particular track, it was a big help to know the basis of each session and being able to jump tracks and learn from several different aspects provided an opportunity to gain a full range of knowledge on the system.

I am grateful to GPLS for providing the scholarships. This allowed to be to be able to travel to and from the conference and beautiful accommodations while attending. I was able to meet, greet and network with individuals from all over about a commonality that we share from miles and miles apart. The opportunity was priceless! Every aspect of the conference was well planned and executed. It is my plan to attend again in the future!

Again, my sincerest gratitude to GPLS for allowing me the opportunity to attend and gain so much knowledge from the conference.

Thank you!
Kimberly Smothers Clayton
Branch Manager/CCLS PINES Administrator
Forest Park Branch Library
Clayton County Library System

Alisa Claytor – Computer Specialist – Athens Regional Library System

2016 Evergreen International Conference

Being a part of this year's Evergreen conference was a well-respected privilege. I am very grateful to have won a scholarship that allowed me to be an attendee. Evergreen is a wonderful database that I'm very proud of, especially since Georgia was the launching site for this innovated open source software.

I began working the Madison County Library (branch of Athens Regional Library System) in November of 2004. Evergreen was still on the drawing board. We received emails from GPLS as to what we would like to see (or not see) in this upcoming new product. This was fascinating to me - a computer, database and bookkeeper geek. It was also great to feel like an important part of the team. As it is still true today - our opinions and insight are still valuable.

In the past 10 years that Evergreen has been our database I have grown very accustomed to the where's/how's/whys. Being able to share what I've learned with fellow library folks during the conference was fun and informative. Hearing Julie tell the story was intriguing.

The programs offered during this conference were very interesting. Having the End User, General or Technical track listed was very helpful. I found myself with the dilemma of which program to attend. As one that wears many hats in our small branch every program offered something of interest to me (or my co-workers). I am very anxiously awaiting the release of all the presentations so I can visit the programs I was not able to attend and to share them with my co-workers that would directly use this information (like some of the cataloging sessions with Holly Bowden).

Our keynote speaker was very stimulating - disruptive innovation is the mission of today's libraries. The Athens Regional Library is helping our community Reimagine Your Library and has the working slogan of *Engaging Communities ~ Exceeding Expectations.* Jason's talk motivated the Habitat for Humanity Board member in me as well. It was a very uplifting talk with ideas that can transfer to our community. The best way to predict the future is to invent it! We (the local library) are the power of the community. I was very moved by Jason's talk.

The session for Overdrive was very helpful - as were all the sessions. I had not worked with Overdrive in several months. This session was an excellent review and revive for me.

Encouragement to join the Documentation team and bug squashing was appreciated. I hadn't really thought that my opinion (knowledge) would help but it will!

Evergreen International Conference Report
Jennifer Durham, Statesboro Regional Public Libraries

The 2016 Evergreen Conference was a wonderful experience. I attended Thursday - Saturday. The programs were categorized into three tracks: End User, General, and Technical. I made my selections based on the program descriptions and found that my choices were balanced between End User and General.

The conference was well-attended with representatives from all sizes and types of libraries. Given my program choices, many of my interactions were with other public library staff. The *Introduction to the Evergreen Community* session was intended for new users, but it also provided an excellent overview to the history of Evergreen and how the software has created library communities. As a Georgia librarian who has worked with Evergreen from its beginning, it was interesting to see how our evolution contributed to other consortiums, but also how they tackled consortium issues in their own ways.

The Acquisitions sessions I attended did not make me any more inclined to move to the Evergreen Acquisitions function, however, I was able to learn how other libraries are using the module. I also attended a session called *SQL for Dummies*. It was a bit overwhelming, but I believe it helped me understand how reports are pulling information from the databases.

I selected several sessions for both refresher work and to learn techniques from other libraries. The instructors presented from a "how we did this and what we learned" perspective. I gained valuable insight on inventory, working with user accounts and bills, using the Item Status screen, and how reports can facilitate error-checking for catalogers. I was certainly intrigued by the *Benefits of Cross-Training Technical Services and Public Services Staff*. Our Technical Services staff already works on the service desks, but I am planning a local staff training session that incorporates basic cataloging information with the Item Status Screen and reading Item Details.

I have begun implementing my conference experience into SRPL's use of Evergreen and our approach to staff training. I appreciate the ability to see Evergreen and large consortiums from a non-Georgia perspective. If future Evergreen International Conferences offer the same diversity and networking opportunity, I believe they would be a valuable experience for other PINES library staff and PINES committee members. If scholarships can continue, I suggest that at least one be awarded to a different Executive Committee member each year. Being able to "step away" from the Georgia model was a good experience.

Thank you for the opportunity to attend the 2016 Conference.

2016 Evergreen Conference Report

Raleigh, NC

Chantal Gunn

First, I would just like to thank the Georgia Public Library Service (GPLS) and anyone else who helped establish this year's Evergreen Conference Scholarship. Attending this conference has allowed me to learn about, connect with, and be inspired by the Evergreen Community. The opening keynote address by Mr. Jason Hibbets was an eye opening introduction to the scope and impact of open source software and initiatives like Evergreen or opensouce.com. The aura of innovation and community building generated by the opening talk framed the rest of my time in Raleigh, NC whether I was moving about a room playing Evergreen Bingo or striking up a conversation with fellow diners during our lunch breaks.

I was very interested in learning about the history and structure of our organization and sessions such as the "Fireside Chat" and "Library Staff Training" allowed me to do just that. I have a better sense of the overall structure, mission, and resources offered in GA Library systems. Through these sessions and conversations with GPLS and other PINES library staff I am now aware of training, development, and networking opportunities like the Internal Relay Chat, help desk, WebEx sessions and the emerging PINES university program. Having only had experience in one library system I very much enjoyed the "Introduction to Evergreen" and "A Tale of Two Consortium" sessions. These presentations and discussions provided a better sense of the similarities and differences observed across states and library systems. During those times we were able to share experiences and learn from each other's successes and areas of opportunities.

There were some instances when certain concepts were discussed that were not familiar to me. This was especially true of the "SQL for Dummies" session which made me acutely aware of how much there is to learn about programming and other technical aspects of the Evergreen software. However, I am glad that I attended this session since exposure to these concepts now will place me in a better position to place them into context when I encounter them in the future. Still other sessions and discussions prompted by audience questions and comments generated a number of handy tips, advice, and best practice suggestions on how to most effectively interact with the Evergreen software on a daily basis. For example, graphic novels are a very popular genre in my library. While attending the "It's Graphic!" conference session I was made aware of potential issues patrons may encounter with multi-volume items that I had not considered previously. Similarly, I was introduced to several new ways to interpret and clear up certain types of billing issues during the "Researching Patron Issues" demonstration. I hope to share this and other useful knowledge gained from sessions addressing the functions of the F5 item status screen and the challenges and benefits of cross-training with fellow staff members to help us improve the quality of service we can provide to our patrons.

As a relatively new member of the Evergreen community, I found attending the 2016 Evergreen International conference to be an invaluable opportunity to learn more about the software that serves as the backbone of many library systems throughout the country and the world. During my time in Raleigh, NC I was able to make connections with other Evergreen members, learn more about how to improve my interactions with the Evergreen software, and gain a better understanding of how my library system and I fit into and can help to shape the future of the Evergreen community. Thank you again for allowing me the opportunity to experience the Evergreen Conference.

Sincerely,

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Sam Link – Greater Clarks Hill Regional Library System

Evergreen Conference 2016
Takeaways and Tidbits

1. Community Engagement

This could be the biggest takeaway from the entire conference – the open source community surrounding Evergreen is incredibly friendly and helpful, and we have people that could help tremendously, especially with documentation. The documentation is written by the users, so all the little tricks and methods that Georgia libraries in general have developed over the past 10 years would actually mean a huge improvement to the general "how-to" guide of Evergreen. I'd really love to see some of our staff become involved in contributing on the documentation side, since we have people who have used Evergreen since launch.
Similarly, if there's a feature missing, or something that doesn't work correctly, or even a menu item that isn't named correctly, we can – and should – bug-report it to the development team. Right now, the most engaged Evergreen systems seem to be Indiana and Massachusetts, and while we might not have the same resources (IN and MASS both have multiple full-time developers on staff).

2. There's Actual Documentation!

Evergreen has documentation! It's not perfect (being community-created), but I learned about features I had no clue about, and – from the reactions of some of the developers there – a lot of people had no idea existed. Like we *might* be able to drop using Librarything to provide our new books list, because there's a way to retrieve that from Evergreen directly, which would cut down on time spent by staff. I need to figure out how that would work, exactly, but I've seen it in action – and I know people I can talk to about how to make it work.

3. Webby The Web Client

a) Development for Webby

   The web client is written in language that I'm familiar with, so I'm going to try to be involved in the work on it. The circulation module is complete, and cataloging is in testing now.

b) The Client Itself

   The web client has some really neat features already, especially in cataloging – buckets can be edited more easily, and adding an item to a bucket doesn't take you away from the item. Also, the interface looks more like the OPAC than currently and is much easier on the eyes.

4. How the whole thing works

a) The very first thing I did at the conference was set up and configure an Evergreen installation. Having now actually touched all the guts, I've got a better feel for why things work how they do – honestly, it's not unlike how our website works. There's a database of information, then a layer that retrieves that information, and then a layer that displays the information. You can actually access the retrieval layer directly, which is how you can get things like new books from Evergreen.

In fact, one of the initial considerations for creating the web client was building it on the same platform we use for our site, but it ran into the time/money barrier of converting all the pre-existing systems.

b) The original idea was for a web-based ILS, but at the time the technology didn't exist, so they've come full circle in development.

To: Elizabeth McKinney and the PINES Committee

Cc: Terran McCanna

From: Tangela McKibbens

Henry County Library System (Branch Manager)

First I would like to thank the PINES Executive Committee for the opportunity to attend this year conference. When I received the email that a scholarship was being offered, I immediately applied in hopes of being granted funds to participate in this event. After a few weeks of impatiently waiting, I finally received the email that I was one of the lucky applicants to receive the scholarship. I contact my director Carolyn Fuller to share the good news and instantly begin making travel arrangements.

Having brief conversation with my director, I was a little nervous that everything would be over my head. I'm not the best when it comes to technology, but with the right teacher, I can catch on quickly. Every presenter was easy to follow, and open the doors for questions. Although the sessions were on a set schedule, nothing seemed rushed. Upon my arrival, the first class I signed up for was "Making the Most of an Evergreen Reports". Chris Sharp did an excellent job with this session. He started from the basic of the database, data types and different codes, to learning the difference between the templates, my folder and shared folders. I usually run reports for daily task, but I never understood how to create a report. Chris was able to explain this process and we all understood.

My second class was "Welcome to Evergreen Community". Learning that you're a part of history makes you feel special. I never knew Georgia was the first to take on Evergreen, and all eyes were watching us. Now there's over 1800 libraries using this software and it all started here in my home state. In addition I learned that "Pines" is not Evergreen, but a system that uses the software. During this session there was also small chat amongst one another, to find out information about things they like or signed up for during their stay for the conference. It was more of a contest, and I won a mug (love my mug) for having the most interactions.

I was impressed that some of the sessions offered, was something that we talk about daily at our circulation desk. For instance "Best practice for cataloging graphic novels" and "Researching Patron Issues". With the Graphic Novel our system has begun switching things around. Our cataloger explained the basic of this change, but attending this class gave me a better understanding about why. Researching patron issues was like a breath of fresh air. In this session I was able to gather information that would help me on a daily basis. Dawn was able to share tips of how to fix patrons with negative

balances (the proper way), placing hold on the right record, and that every patrons/staff has a user ID. She shared information about “Pines U” that will be on GPLS website that new employees could use and also be used as continued education materials.

Overall this conference was a success for me. I was able to share my learning with others within my system, and encourage them to apply for next year scholarships. Once I figured out how the sessions were categorized, I advise them to stay away from any (technical high) unless they were up for the challenge. I pretty much attended sessions set aside for (End User) and (General). Those sessions worked best for me being an End User. Thank you again for the opportunity for allowing me to see the other side of Evergreen. It was definitely an eye opener of what it takes for this software to run smoothly. I’ve also took the initiative of joining the list serve and really thinking about participating in the “Bug Squashing”.

As a new employee (and Assistant Director) for a public library system, it was a great opportunity to be selected for the scholarship. Attending the workshops help me learn about some of the back "room" operations of Evergreen. When I first started using PINES as an employee, I didn't understand the connection between Evergreen and PINES. I like to know that relationships of databases because it helps me understand the workings of the system.

Although most of the sessions were insightful and useful, I really enjoyed the session on "Overdrive". I was so excited about adding this feature to our OPAC. This will help increase the usage statistics for our Overdrive collection.

I also enjoyed the session where they spoke about the PINESU where you can test you staff on Circulation concepts proved very useful because it provides us with provide another training opportunity for our new staff member and a refresher for our existing staff members.

In addition, I picked up other miscellaneous tips such as adding a field in PINES that allows you to know who last edited the record and how to click on the line where the amount is to clear off a bill.

Overall, the sessions help me strategically make plans for different section of our circulation and technical services department. It opened up creative ideas for a better workflow within my departments.

Thank you,

Belle Reynoso
Clayton County Library System

Evergreen 2016 Conference, Raleigh, NC
Ceil Smith. TRRLS

I was excited, thrilled, and grateful to be able to attend the Evergreen 2016 conference in Raleigh. Past conferences have been too far away or came up at bad times, budget-wise. I've been a proponent of Evergreen from the beginning and since we went live in 2006, I've often found myself in the position of head Evergreen cheerleader in my library system. The topics offered this year covered a wide spectrum of topics and I was able to find sessions that addressed my current job requirements but also expand my horizons a little with some classes that were more tech focused than I'm used to.

I started the conference with Chris Sharp's session on reports and Rogan Hamby's SQL presentation. I try to get into reports training any time I can. There's so much to learn about reports that even in basic classes, I come away with new knowledge or a greater understanding of the overall process. This time around, I was able to walk away with a better understanding of the language behind the reports and the general structure of the database. I believe this understanding will help me when I'm trying to create future report templates.

Even though I've worked with Evergreen for 10 years, I attended the Introduction to the Evergreen Community session because I did not really know much about Evergreen outside of PINES. I was amazed to learn how widespread its use has become (Mexico, Scotland and across Europe!), and I enjoyed the enthusiasm of the new arrivals to the Evergreen community.

Several sessions offered information I could bring back to my library system for immediate use. I attended the inventory session because several of our libraries have expressed interest in conducting collection inventories. PINES has a recommended process and reports set up, but I was interested in seeing what Evergreen libraries outside of PINES were doing. The presentation left me with a few things to think about, especially working in smaller batches and even using Standalone for the shelf work. I think a combination of the suggestions from the presentation and our current workflow will be our best bet for now. I plan to combine suggestions from the presentation with our current work flow to improve our process.

I assist my libraries with circulation and patron-related problems regularly, and the Researching Patron Issues and F5 Magic sessions were very helpful. I learned some new strategies for patron searching and bills resolution. In explaining how to search patrons by Database User ID, Dawn helped me connect the SQL information from the first day of the conference to my everyday work in Evergreen. And I have been dealing with refunds for a long time, but I learned here that the Refund function in Evergreen doesn't work if the patron never paid any money. This piece of information will be extremely helpful when we are investigating unusual or unexpected refunds.

The best part of the conference was meeting and talking with non-PINES Evergreen users. I am one of the few people in my library system who remembers where we were before Evergreen and all the challenges that led to its creation. The enthusiasm of those folks who are new

Evergreen users reaffirmed for me that Georgia libraries did something really special for the library community.

Linh Uong
Collection Management / PINES Operations Librarian
Northeast Georgia Regional Library System

Summary and takeways: 2016 Evergreen International Conference

As much as I've enjoyed attending GaCOMO, I enjoyed the Evergreen International Conference even more. It was a great opportunity to immerse myself in all things Evergreen. As a first-timer, I thought NC Cardinal did a wonderful job hosting and organizing the conference; and as a speaker, I really appreciated their assistance in helping me set up for my presentation and checking to make sure everything was running smoothly. I also liked the fact that only three sessions ran concurrently versus half a dozen and more. It gave me the chance to attend the sessions related to my job as well as those outside my department, giving me the opportunity to learn something new.

Session-wise, two that I found really useful were "Oops, I Accidentally Deleted Something (and other small problems): Bite-Sized Reports to Help You Find and Fix Problems in Your ILS" and the Serials Round Table. Since I'm usually the to-go person in my library system for reports (before a helpdesk ticket is sent), any presentations on reports are always helpful. Likewise, the serials interface is a new feature that I'm interested in testing and using.

One of my favorite general sessions was the "Fireside Chat: Pioneering and Early Development of Evergreen" with Julie Walker and David Singleton. I knew a little PINES history beforehand, so it was a very informative session - especially the fact that Bin Lin came up with the name "Evergreen". (Go PINES!) The fireside chat was very appropriate for the 10th anniversary of Evergreen.

One of my favorite non-session events was the Friday dine arounds. That was a great way to introduce attendees to each other and introduce out-of-towners to some great restaurants in downtown Raleigh.

Lastly, the biggest takeaway I had was to be able to experience the Evergreen community at large, first-hand. It's one thing to be on the Evergreen listserv, which is a great and practical way to communicate across distances - it was even better to meet and converse in person. I met many wonderful people, one as far away as Canada, and it was just GREAT to talk Evergreen for four days straight.

Thank you for the opportunity to attend the Evergreen Conference!