



GROWING EVERGREEN 2010 INTERNATIONAL CONFERENCE

CONFERENCE SCHEDULE WEDNESDAY, APRIL 21, 2010

- 8:00 am – 7:00 pm** **Registration Open** *West Concourse*
- 8:30 am – 10:30 am** **Coffee Break** *West Concourse*
- 9:00 am – 12:00 pm** **Hackfests**
- 9:00 am – 12:00 pm** **Hands-On Coding for Developers Hackfest**
Pearl Room, Self-guided
- 10:00 am – 11:30 am** **Sys Admin and End User Hackfest: Reports Roundtable**
Atrium Room, Anoop Atre and Jenny Turner
- 10:00 am – 11:30 am** **Sys Admin and End User Hackfest: Authority Roundtable**
Cascade Room, Shae Tetteron
- 1:00 – 4:00 pm** **Hackfests**
- 1:00 – 4:00 pm** **Hands-On Coding for Developers Hackfest**
Pearl Room, Self-guided
- 1:00 – 4:00 pm** **DIG Hackfest: Evergreen Documentation Interest Group Discussion**
Atrium Room A, Sally Fortin
- 1:00 – 2:30 pm** **Sys Admin and End User Hackfest: Sys Admin Roundtable**
Cascade Room, Evette Atkin and Megan Dudek
- 2:30 – 4:00 pm** **Sys Admin and End User Hackfest: Holds Roundtable**
Cascade Room, Grace Dunbar
- 3:00 – 4:00 pm** **Hands-On Coding for Developers Hackfest: Meet the Developers**
Pearl Room
- 4:15 – 5:15 pm** **Evergreen Foundation Forum**
Atrium Room
- Elizabeth McKinney, PINES Program Director of the Georgia Public Library Service
- The purpose of this session is to bring together interested parties to discuss the formation of a non-profit entity to allow 1) GPLS/PINES transference of the Evergreen assets from the State of Georgia to a non-profit entity representing the Evergreen community at large; 2) to discuss ideas for facilitating collaboration within the Evergreen community; 3) to discuss potential user/interest groups for library staff and directors, and 4) to discuss the opportunities and challenges we face as individual Evergreen installations and as a community.
- 5:30 – 7:00 pm** **Exhibitors' Reception** *West Concourse*
- 7:00 pm** **Pub Crawl Meet at Registration Table** *(West Concourse)*





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CONFERENCE SCHEDULE THURSDAY, APRIL 22, 2010

8:00 am – 5:00 pm **Registration Open** *West Concourse*

8:30 am – 5:00 pm **Exhibits Open** *West Concourse*

8:30 am – 10:30 am **Coffee Break** *West Concourse*

9:00 am – 10:00 am **Opening Session**
Ambassador Ballroom West

Welcome

Developers Update

The State of Evergreen
Bob Molyneux, Vice President of Business Development, Equinox Software

10:15 am – 11:15 am **Opening Keynote: KCLS and Open Source Library Systems**
Ambassador Ballroom West

Bill Ptacek, Director, King County Library System

KCLS recently received a 3-year, \$998,556 National Leadership Grant from the Institute of Museum and Library Services to share current development work on the Open Source Library System (OSLS), Evergreen, with other libraries and develop resources to make the OSLS a more viable alternative to the traditional Integrated Library System (ILS) for libraries across the nation. Ptacek will discuss the goals of the project and its impact for other Evergreen libraries.

11:30 am – 12:15 pm **Breakout Session (Cultivating Code Track)**
Emerald Room

Slinging Data: Data Loading and Cleanup in Evergreen
Galen Charlton, Vice President for Data Services, Equinox Software

This semi-technical talk will offer tips and tricks for preparing and loading bibliographic and circulation data in Evergreen as part of a migration. We will also discuss performing data cleanup projects after migration.





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11:30 am – 12:15 pm Breakout Session (Growing the Community Track)

Cascade Room

So, Can I Change the Code?

Kate Sheehan, Open Source Implementation Coordinator, Bibliomation

Advocating for open source in libraries can be tricky. Techie excitement about the advantages of open source may not thrill everyone in the library. Bibliomation has taken a unique approach to migrating their consortium by starting with small, non-member libraries. The development partners provided practice from a technical perspective but the concerns and needs of these libraries are very different from the rest of the consortium. Kate Sheehan will discuss the dynamics of change management and open source evangelism in Bibliomation's conversion to Evergreen.

Breakout Session (Seed to Tree Track)

Atrium Room

Evergreen Acquisitions Roundup

Bill Erickson, Vice President for Software Development and Integration, Equinox Software

Take a guided tour of the Evergreen Acquisitions module. Learn the basic acquisitions work flow from selection and ordering to receiving, cataloging, and invoicing. Discussions will include vendor connectivity with EDI and serials support for Evergreen. Rest assured there will be plenty of time at the end of the session for Q&A.

12:30 pm – 1:45 pm Lunch

Ambassador Ballroom East

KCLS Enhancements for Evergreen

The King County Library System and Equinox Software have been working together over the past year enhancing Evergreen. The goal of their work is to support the high volume and automation demands of KCLS, as well as highly centralized work flows for Acquisitions, Cataloging, and Holds Delivery. Curious what all is on their timeline or what new features are being worked on? Jed Moffitt and Matt Carlson from KCLS will be joined by Bill Erickson from ESI to discuss their project and answer your questions.





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2:00 pm – 2:45 pm

Breakout Session (Cultivating Code Track)

Atrium Room

The Life Cycle of an OSRF Request

Scott McKellar, Software Developer, Equinox Software

An overview of how an OSRF transaction wends its way from a client to a server and back. To be covered: data encoding; wrapping and unwrapping messages in layers for delivery; message routing; the role of Jabber in tying everything together.

Breakout Session (Growing the Community Track)

Emerald Room

SC LENDS Consortium Becomes a Reality

Rogan Hamby, Systems Librarian, Florence County Library System

Ray McBride, Director, Florence County Library System

SC LENDS began forming in 2008 with a vision of expanding library services and materials throughout South Carolina member libraries. In 2009, our ten charter libraries are now online and reaping the benefits of the 'Evergreen effect.' Learn how we got here and what we learned.

Breakout Session (Seed to Tree Track)

Cascade Room

Getting There from Here

Cheryl Gould, Training Facilitator, Fully Engaged Libraries

Whether your decision to move to Evergreen was a top-down decision or a consensus-based decision, you need to get people on board and ready to do things differently. Without a vendor to run the show, you'll need a broader base of support from staff during migration and, to take full advantage of your new system, you'll need staff to stay fully engaged through implementation. In this session, you'll learn some key training and communication techniques to help establish an environment where staff are eager to contribute and can't wait to start moving away from the status quo.

3:00 pm – 3:45 pm

Snack Break *West Concourse*

3:00 pm – 3:45 pm

Breakout Sessions (see next page)





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3:00 pm – 3:45 pm

Breakout Session (Cultivating Code Track)

Atrium Room

My Brain 'urts! Or Evergreen SQL 101

Mike Rylander, Vice President for Research and Design, Equinox Software

Learn the layout of the Evergreen database schema, from how the tables are used to how they are populated and interconnected. You will leave with an understanding of how to explore and exploit the data available to them via the Evergreen Reporter, the Postgresql command line, and external 3rd-party database tools.

Breakout Session (Growing the Community Track)

Emerald Room

DIY – Doing an Evergreen Installation

Bob Molyneux, Vice President of Business Development, Equinox Software

Mary Toma, Head Librarian, South Central Regional Library

Robert Soulliere, Systems Librarian, Mohawk College of the Applied Arts and Technology

Cynthia Williamson, Mohawk College of the Applied Arts and Technology

There are many paths to Evergreen and a few libraries have migrated to Evergreen using just the resources from the community without contracting with any firm. This panel examines smaller libraries who used town resources to migrate. They support their Evergreen installations today from internal resources and without contracting with outside sources. This method for implementing Evergreen is a positive aspect of Evergreen and the community can learn from them. How did they do it? What were the difficulties? What suggestions can these librarians make to make it easier for other libraries to do the same thing in the future?

Breakout Session (Seed to Tree Track)

Cascade Room

Migration and Training: Preparing Your Data and Your Staff for Transition to Evergreen

Sally Fortin, Educational Services Manager, Equinox Software

Shae Tetterton, Senior Project Manager, Equinox Software

Equinox staff present tips for preparing staff and data for your move to Evergreen. Topics "Nurturing Staff: Equinox Training Practices & Recommendations" and "Harvesting the Data: Migration Time Lines & Tips for Data Cleanup." The presentation will be panel style with a question and answer period at the end. Current Evergreen customers are encouraged to attend to lend your expertise to our growing Evergreen community.





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4:00 pm – 4:45 pm

Breakout Session (Cultivating Code Track)

Cascade Room

Managing Serials with Evergreen: A Case Study of Hekman Library at Calvin College

Steven Putt, Electronic Services Librarian, Calvin College

Daniel Wells, Library Programmer Analyst, Calvin College

Computers are generally accurate, predictable, and reliable. Publishers frequently are not. Quality serials management software should bring harmony to this discord, maintaining the accuracy of one's holdings by making the regular additions easy and the irregular additions possible. This presentation will explore current Evergreen developments in predictions, holdings, and claims functionality which bring us closer to these goals.

Breakout Session (Growing the Community Track)

Emerald Room

Plays Well with Others

Matthew Carlson, Evergreen Project Coordinator, King County Library System

Jed Moffitt, Director of Information Technology Services,
King County Library System

Amy Terlaga, Assistant Director of User Services, Bibliomation

What has King County Library System been up to since they received that \$1 million IMLS grant? For starters, they have formed a resource cooperative, RASCEL (Resource and Sharing Cooperative of Evergreen Libraries). Learn how RASCEL can assist in collaboration opportunities with other libraries, such as Evergreen enhancements, training, and documentation.

Breakout Session (Seed to Tree Track)

Atrium Room

True Confessions of a First-Time Project Manager

Melissa Lefebvre, Project Manager, Bibliomation

Bibliomation has been through migrations before, but the move to Evergreen has proved to be a different animal. Learn about managing the migrations of small libraries with antiquated technology and the impending migration of Bibliomation's Horizon libraries. The modifications made to Evergreen to offer features that member libraries have come to expect, like training videos documentation will be discussed.

5:30 – 7:00 pm

Library Reception 111 Library Street, Grand Rapids MI 49503

7:00 pm

Dine Arouds Downtown Grand Rapids





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8:30 am – 11:00 am Exhibits Open *West Concourse*

8:30 am – 10:30 am Coffee Break *West Concourse*

9:00 am – 9:45 am **Breakout Session (Cultivating Code Track)**
Cascade Room

Enhancing Your Record Display: A Gentle Introduction

Dan Scott, Systems Librarian, Laurentian University

Creating a customized record display in Evergreen became much easier with the 1.6 release featuring the debut of BibTemplate... easier, that is, if you know what you're doing. This session provides a grounded introduction to BibTemplate, with examples and extensions drawn from Laurentian University. Take control of your catalog and meet the specific needs of your patrons!

Breakout Session (Growing the Community Track)

Atrium Room

Getting Involved: How YOU Can Make Evergreen Even Better

Andrea Buntz Neiman, Technical Services Librarian, Kent County Public Library
Karen Collier, Public Services Librarian, Kent County Public Library

Whether your job involves circulation or administration, whether you work at a small library or large consortium, whether you're a programmer or a technophobe, there's a place for you in the Evergreen community. This session will discuss why you would want to get involved despite your busy schedule, as well as practical ideas for how you can help. An interactive Q&A session designed to encourage networking within the audience will follow the presentation.

Breakout Session (Seed to Tree Track)

Emerald Room

Each One Train One

Jennifer Bielewski, Educational Service Librarian, LYRASIS
Jenny Liberatore, Educational Service Librarian, LYRASIS

Migration has come and gone but training is an ongoing challenge. Grow your own training program with Each One Train One. In this session, discover the tools and resources already available within the community to develop trainers from within your library. Participants will walk away with "a gardening kit" of tools to root and establish your training program!





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10:00 am – 10:45 am **Lightning Talks**
Ambassador Ballroom West

11:00 am **Closing Keynote: Open Source Software and Libraries: A Current Analysis**
Ambassador Ballroom West

Eric Lease Morgan, Head of Digital Access and Information Architecture
Department, University Library of Notre Dame

Eric Lease Morgan has been practicing open access publishing and open source software distribution since before the phrases were coined. Both a librarian and computer user, his professional goal is to discover new ways to use computers to increase library collections and improve library services. Some of Lease Morgan's more notable investigations have surrounded the automatic collection of electronic serials, the indexing of open access content, and the personalization of library websites.