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ILS: Evergreen

Web address: <http://evergreen-ils.org/>

Evergreen is an open-source, accessible integrated library system. Like many ILSs Evergreen features an online public access catalog and staff client. Evergreen was created in 2006 to serve Georgia Public Library system needs . Once Evergreen was released it got adopted by several libraries inside United States and Canada. Today Evergreen is used by more than 1000 libraries around the world. Evergreen's features include circulation, cataloging, billing, reporting, acquisitions, serials and much more. Evergreen is open source ILS software so its users provide support and features. Evergreen's integrated library system is compatible with Windows, Mac and Linux. Evergreen's has been designed in a way which can be useful for all end users. For example, Evergreen can be used as a metadata search engine; Evergreen is also a transaction processing engine. Evergreen provides service for academic (K – 12, and higher education), public libraries, and special libraries. I demonstrate Evergreen ILS from my personal computer. Evergreen has simple and advanced search options with a list of libraries. Users can search for any kind of library materials with the use of Evergreen search engine. The checklist provides more information about Evergreen ILS. Evergreen Indiana provides trainings for cataloging, circulations, administration and it does charge tuition fee. The payment page requires password so I am not able to check the amount which they charge for each training session.

Comparison of Evergreen (By Afifa Alawi) with Greenstone (By Robert Moushon)

Evergreen	Greenstone
Based in United States	Based in New Zealand
Open source ILS	Open source ILS
Since 2006	Since 2004
compatible with Windows, Mac and Linux	compatible with Windows, Mac and Linux, Android/iOS
Academic (K – 12, and higher education), public libraries, and special libraries.	K – 12, and higher education, public libraries
Can be customized only by certain users	Open end can be customized by end users
MARC compliance	MARC compliance
Trainings available (charges tuition)	Trainings available
Can be accessed without Java script	Greenstone requires Java and a short setup process,
Mostly English	Available in several Languages
Weekly updates	Regularly updates(Daily)
Basic and advanced searches	Basic and advanced searches
using AND, OR, NOT to link and exclude terms like all libraries.	Boolean (i.e. using AND, OR, NOT to link and exclude terms) built differently
Searching across all fields e.g. Keyword, Author, Title, Subject Heading is available	Searching across all fields e.g. Keyword, Author, Title, Subject Heading is available
Search results with visual prompts depicting format, location and availability information is set and cannot be changed	Search results with visual prompts depicting format, location and availability information is customizable.
Name (author, illustrator, editor, joint author etc.) is set and cannot be altered.	Name (author, illustrator, editor, joint author etc.) Fully customizable
Provides tools for building digital library. and supports digital library	Provides tools for building digital library.
Webinar trainings	Not specified
No tolerance for misspelling	

Integrated Library Systems (ILS) Checklist

- This is a guide to assist your school to make informed decisions and not intended to be comprehensive.
- Explanations of terms can be found in the Glossary.

Date: 11- 26 - 2013				
Name of Vendor: Evergreen ILS				
Name of Library System: N/A				
Vendor's Profile		Yes	No	Comments
	Company background and experience	X		Since 2006
	Other schools using the system	X		K – 12 , High Ed.
	Website address	X		evergreen-ils.org/
	Demonstration available online	X		
	School or on-site demo available	X		http://catalog.evergreen.lib.ir
Technical Specifications (Technical Architecture)		Yes	No	Comments
Operating system	Software compatible with school's ICT platform, e.g. Mac, Windows, Linux	X		
	Web based system is hosted on a reliable remote server	X		
	Minimum specifications for Server and Client supplied and checked	X		
Networking capabilities	Software operates in Area Networks including LAN, WAN and WWAN Wireless	X		
	Supports Structured Query Language (SQL) to aid database communication	X		
	OPAC can be accessed across the school network including LMS and Web	X		
	Software supports multiple users using different modules	X		
	System supports Mobile Learning technology	X		Windows, mac and Linu
Backups	Back up and restore of data is well documented and intuitive	X		
	Web based systems are fully maintained by vendor on remote server	X		Updated weekly
	Automatic and initiated backup process	X		
Standards	MARC compliant – importing, exporting and conversion of MARC data	X		
	Z39.50 compliant – SMS and LMS compatible	X		
Web module	Web module available	X		
	Functions from the web include WebOPAC, Homepage etc			
	Able to customise screens, e.g. colour, font, school logo etc.	X		By certain users/administrato

	Supports URLs and hyperlinks from bibliographic records for author, subject etc.	X		
	Port Forwarding/Mapping for secure offsite access of OPAC via school website	X		
Support Services		Yes	No	Comments
Contract	Easily understood: plain English	X		
	Period covered	X		
	Ongoing costs		X	Open source
Documentation	User manual provided (online and print) – screen shots, fully indexed, easy to use	X		
Training	Phone and fax (free or toll)	X		317-605-3772 Indiana Centre
	Email			
	Online, on-site	X		Webinar
	User groups – local meetings, vendor attendance	X		
	Customer focused staff - (check with other schools)	X		
Helpdesk	Phone and fax (free or toll)		X	
	Email	X		
	Website	X		
	Hours, costs, response time	X		24/7
	Length of support period	X		VARIES (usually 2 Hr.)
	Customer focused staff - (check with other schools)	X		Committee meeting
System development	Vendor notification and implementation of new functionality as appropriate	X		feedback@evergreen-ils.org
Costs (Also listed in individual sections)		Yes	No	Comments
Support	Contract – current and ongoing costs			Cannot locate cost informatio
	Training – current and ongoing costs	X		Requires password
	Helpdesk – current and ongoing costs	X		Requires password
	Consortium arrangements between other users – e.g. shared catalogues, databases etc		X	
Hardware	Existing school hardware meets the vendor's recommended standards			
	Library hardware is up-to-date and included in school ICT upgrades and maintenance	X		
	Library workstation hardware meets the vendor's recommended standards			Does not apply
	Library workstation includes barcode reader/scanner with usb connection			
	Library workstation includes local or networked printer for spine labels, barcodes etc			
	Dedicated Search/OPAC workstation/s are available for student use in the Library			

Software	Existing school software meets the vendor's recommended standards	X		Mac, Windows, Linux
	Library software and online access is up-to-date and included in school ICT upgrades and maintenance	X		
	ILS modules include cataloguing, circulation, acquisitions, periodicals, OPAC and Web	X		
	Itemised costs for basic system and other modules	X		
	Users per licence	X		
	Licensing for more than one installation	X		
Software Support	Includes or excludes upgrades	X		INCLUDES UPGRADES
	Data migration between old and new system	X		
ICT Funding	ICT budget allocation current and ongoing	X		
	Catalogue Record subscription service from SCIS	X		
	Catalogue Subject Headings and Authority File service from SCIS	X		
Installation		Yes	No	Comments
Hardware	Existing hardware meets the vendor's recommended standards			Does not apply
	Library hardware is up-to-date and included in school ICT upgrades and maintenance			
	Library workstation hardware meets the vendor's recommended standards			
	Library workstation includes barcode reader/scanner with usb connection			
	Library workstation includes local or networked printer for spine labels, barcodes etc			
	Dedicated Search/OPAC workstation/s are available for student use in the Library			
	Processing speed required – acceptable speed of record recall			
	Compatible with barcode reader/scanner			
	Supports multiple users using different modules			
Software	Existing school software meets the vendor's recommended standards	X		Weekly Updates
	Library software and online access is up-to-date and included in school ICT upgrades and maintenance	X		
	Runs on school's current ICT operating system, e.g. Mac, Windows, Linux	X		
	Compatible with school's SMS and LMS	X		
	ILS modules include cataloguing, circulation, acquisitions, periodicals, OPAC and Web	X		
	Other software required e.g. Windows, Web browser	X		Mostly done inside Evergreen
	Dedicated Search/OPAC workstation/s are set to access Library Home and or OPAC in Library			
	Library has a dedicated page as part of LMS and/or school website which includes OPAC access			

Access control (Security)		Yes	No	Comments
User identity	Levels of security prevent unauthorised access or misuse of the system	X		users with valid account
Passwords	Password access for various user groups, e.g. staff, students, librarians	X		
	Password access for administration modules, e.g. cataloguing, circulation,	X		
	Logoff (Exit) password for OPAC	X		
	Required to change password regularly		X	
Offsite access	Port Forwarding/Mapping for secure offsite access of OPAC via school website	X		
Usability		Yes	No	Comments
Prompts	Prompts for missing data for required fields			
Clipboard	Allows copying and pasting across the system			
Usability	Graphical User Interface (GUI) screens are friendly and intuitive			
	Easy to use, intuitive screens, prompts, icons and navigation aids			
	Able to move between different screens and functions intuitively	X		
	Allows multiple windows to be open simultaneously and easily accessed		X	
	Provides pre-programmed function keys			
Modules				
OPAC (Online Public Access Catalogue) (WebOPAC)		Yes	No	Comments
Searching	Clear and intuitive			COULD NOT DEMONSTRATE
	Help screens – interactive, easy to find and searchable			
	Reservations option available through the OPAC			
	Borrower can view overdue, loans, reserves etc.			
	Borrower interaction including borrower profile, book reviews and lists of favourites	X		
	Searching across all fields e.g. Keyword, Author, Title, Subject Heading	X		Simple search option
	Boolean (i.e. using AND, OR, NOT to link and exclude terms)	X		With the advance search option
	Truncated searches – able to shorten the search term			
	Basic and advanced searches	X		
	Effective alternative spelling facility – misspellings retrieves useful results			Cannot demonstrate
	– list of preferred terms available	X		
	Punctuation sensitivity – correct punctuation should not be required	X		
	Case sensitivity – upper and lower cases should be interchangeable	X		

	Interactive map linked to location and classification	X		
Displays	Search results with visual prompts depicting format, location and availability information	X		
	Records in full and brief formats	X		
	Records with visual prompts including book covers, location maps and availability information	X		Mostly digital item
	Number of copies of a resource	X		
	Status of resources: e.g. on order, on loan	X		
	Date due for borrowed resources	X		
	The number of records found and availability of items (i.e. if item is borrowed)	X		Shows items per library
	Results can be ranked by relevance e.g. author, title, year, classification, format etc	X		
	Hyperlinks to Authority fields e.g. Authors Names, Subject Headings, Series, Classification	X		
	Hyperlinks to website urls	X		
	Hyperlinks open in new window	X		
	Access to catalogued full text multimedia resources, Word documents, images, pdfs etc.	X		
	Icons identify material type in results list, e.g. websites	X		
	Book cover images included as part of Catalogue record	X		
Usability	Web page option for library news etc	X		
	Graphical User Interface (GUI) screens are friendly and intuitive	X		
	Choice of search interface e.g. Junior, Senior, Teacher	X		Check the Indiana State Lib.
	Search and display screens intuitive and easy to navigate	X		
	Context-dependent help i.e. Help information relates to where you are in the database		X	
	Search options include field-based and text-string options			
	Flexible search options include relevance ranking			
	Author's Name, Series and Subject Headings are hyperlinked to create lists of same	X		
	Downloading of search results	X		
	Catalogued multimedia and internet resources can be linked to and viewed	X		
	Personal list creation, borrower profile and review options	X		
	Online reserve, review and feedback options			
	Results and online resources can be accessed quickly without the use of multiple logins.	X		
	Web and other online resources open in new window		X	
Cataloguing (Data Entry)		Yes	No	Comments
	Cataloguing process includes both manual and rapid entry options			

MARC fields	Imported catalogue records (Copy Cataloguing) include all of the following fields:			
	Name (author, illustrator, editor, joint author etc.)	X		
	– individual names have separate authority records, i.e. one name, one line	X		
	Title	X		
	Variant (Other) title	X		
	Subject headings – Add additional Subject Headings from SCIS	X		
	Physical description	X		mostly digital
	Edition	X		
	GMD (General Material Designation), e.g. book, videorecording, website, etc.	X		
	Publishing information (place of publication, publisher, date of publication)	X		
	Series – ability to enter more than one series, plus series number	X		
	Notes – field length adequate to include all necessary information	X		
	ISBN, ISSN – ability to scan into field	X		
	URL field for cataloguing websites – ability to enter more than one url	X		
- Local fields	Most commonly edited fields - check for ease of access, editing and saving:			
	Call/Classification code, i.e. Dewey number, shelf location etc:			
	-Classification code imports in preset Non Fiction format e.g. 513.2 not 513.2 ALD	X		
	-Classification code imports in preset Fiction format e.g. ALD not F ALD	X		
	Keywords – ability to automatically generate and enter manually	X		
	-Keyword searches are able to be configured to search certain fields	X		
	Location e.g. Library, Library Office, Staff Room, Teacher Resource Room	X		Multiple library search
	Age level – ability to suppress in OPAC student view	X		
	Barcode/Accession number – ability to be generated automatically or scanned in.	X		
	Date of purchase	X		
	Price, Purchase (Actual cost paid) - ability to maintain accurate budget.	X		
	Price, Overdue/Replacement (Actual cost for replacement) – ability to adjust cost	X		
	Supplier (Source) e.g. Donation, Duffy Book, Supplier's name	X		
	Status e.g. New Book, In Library, Lost, Missing, Withdrawn	X		
	Media e.g. Book, CD, DVD Website, Poster, Board Game	X		
	Resource Type/Format e.g. Fiction, Non Fiction, Reference, Picture Book, Website	X		
	Websites – ability to untick stocktaking option for Websites	X		
Import MARC files	Z39.50 standard allows for direct and transparent transfer of catalogue record data	X		

	Schools Catalogue Information Service (SCIS) data transfer	X		Indiana States Libratries
	SchoolsCat data transfer	X		
	Other cataloguing service data transfer	X		
	NB: Imports bibliographic records with no loss of content including Notes when available			
	Authority files maintained globally e.g. Authors' Names, Series and Subject Headings	X		
Exporting records	Easily exported from the system	X		
	Data not locked to prevent data migration	X		
	Cost of data migration between old and new system		X	open source
	Data is fully MARC compliant and not system dependent	X		
	Able to convert non-MARC to MARC			Can not demonstrate
Usability	Cataloguing module is easy to find and open			
	Graphical User Interface (GUI) screens are friendly and intuitive	X		Basic GUI
	Cataloguing fields visible and intuitive to edit and save	X		By certain users
	Support for non-Roman scripts and Macron for Maori words		X	
	Ability to edit all imported data	X		By certain users
	Ability to edit all Catalogue fields for direct cataloguing	X		
	Ability to generate and print own barcodes and spine labels			
	Ability to display records in MARC format	X		http://catalog.evergreen.lib.ir
Circulation (Issues and returns)		Yes	No	Comments
Borrower files	Borrower type (Student, staff, etc.)	X		
	Borrower's names		X	
	Borrower barcode			CAN NOT LOCATE
	Gender		X	Does not specifies
	Level			Does not specifies
	Class	X		
	Date of birth	X		
	Address	X		
	Parent / Guardian details	X		
	E-mail	X		
	Telephone	X		
<ul style="list-style-type: none"> Displays details of transactions on the screen when issuing, returning and stocktaking 				

<ul style="list-style-type: none"> Importing and exporting – student files can be exported from other student management systems and imported into the integrated library system 				Not able to demonstrate
<ul style="list-style-type: none"> Ability to edit all imported data 				
<ul style="list-style-type: none"> Allows photo ID to be added 				
<ul style="list-style-type: none"> Creates short records allowing full registration later 				
<ul style="list-style-type: none"> Messages can be attached to a borrower's record 				
<ul style="list-style-type: none"> Tracks the last patron to borrow an item 				
<ul style="list-style-type: none"> Overdue notices by individual, class and year 				
<ul style="list-style-type: none"> Able to email overdues 				
<ul style="list-style-type: none"> Details of borrower history, by date, current loans, overdues are available 		X		
<ul style="list-style-type: none"> Globally changes year, groups and classes 		X		
Loan periods	Set individually and globally for year, groups and classes			Can not demonstrate
	Set individually and globally for types of resources for year, groups and classes			
	Renewals/extensions – bulk renewals			
Loan limits	Set individually and globally for year, groups and classes			
	Enables selected borrower groups to access specific resource categories			
	Block loans			
	Loan bans			
Reservations	Alerts library staff when a reserved item is returned and issued			
<ul style="list-style-type: none"> Authorised staff override circulation defaults, e.g. loan limits, loan periods etc. 				
<ul style="list-style-type: none"> Includes a recall facility 				
<ul style="list-style-type: none"> Authorised staff can identify the borrowers of all copies of all resources via the OPAC 		X		
Usability	Circulation module is easy to find and open	X		
	Graphical User Interface (GUI) screens are friendly and intuitive	X		
	Circulation options are intuitive to edit and save	X		
Reports		Yes	No	Comments
Report Options	Offers both prepackage and custom options.	X		
	Ability to generate reports easily and efficiently	X		
	Ability to be previewed and / or printed	X		
	Display options e.g. Bar chart, Pie chart, Line chart	X		
	Ability to save online	X		

Circulation				
Resources	Number of times resources have been borrowed, by individuals, groups, classes etc.			Cannot locate Resource information.
	Resources most and least used			
	How often individual and groups of resources have been used			
	Number of times resources have been used, including a non-circulation count			
	Resources currently issued to a borrower			
	Number of items issued and returned by day, week, month and year			
	Generates a list of unfilled reservations			
	Number of reserves placed across the collection and on individual items			
	Issues by resource category, e.g. fiction, non-fiction, teacher resources	X		
	Top authors issued in a given period	X		
	Top titles issued in a given period	X		
Borrowers	Lists who has borrowed a resource	X		
	Borrower history	X		
	Resources and resource categories borrowed by class, year, group etc.	X		
	Names of borrowers by class, year, group etc.	X		
	Borrower cards	XX		
	Overdues by group, class and individual	X		
	Which resources are currently on loan?	X		
Notices	Generates reservation notices	X		
	Generates recall notices	X		
	Text Messaging option for overdues etc		X	Email notification
Cataloguing				
Resources	Lists resources catalogued between a range of dates	X		
	Lists items by location, classification, status and resource type	X		
	Number of resources by location, call number	X		
	Value of resources by location and accession date	X		
	Number of resources by GMD e.g. book, videorecording, website, etc.	X		
	Number of resources accessioned between a range of dates	X		
	Resources with duplicate barcodes	X		
	Collection in shelf list order	X		
	Resources purchased by supplier			

Authority lists	Produces authority lists, e.g. subject, author	X		
	Lists authority records which do not have resources attached (subject, author etc.)		X	
	Generates a list of subject headings, including ‘see’ and ‘see also’ references	X		
	Lists resources attached to subject authority records			
Inquiry				
Searches	Identifies borrower searches, including search term and type of search		X	
Stocktaking				
	By location			Can not demonstrate
	A section at a time			
	While the collection is circulating			
	Ability to withdraw and retrieve records before they are purged			
	Ability to finalise stocktake at different times for different resources, sections, locations			
Resources	Lists resources which have been scanned by call number and location			
	Current stock by location, call numbers, value and copies			
	Retains withdrawn / missing resources until the end of audit cycle			
Printing		Yes	No	Comments
	Provides data to screen and printer	X		
	Prints reports to screen and / or printer and / or file	X		
	Prints Help screens	X		PDF
	Retains report parameters for print options	X		PDF