

Project Plan: Overhaul of Evergreen-ILS Online Ecosystem

Executive Summary

Currently, the Evergreen software community has a number of separate online properties offering different resources and serving different community members. Leaders of the emerging EG governance body have determined that the lack of formal structure and organization is impeding the effective use of these resources by community members. As the EG community continues to grow, a well-planned online strategy will be crucial to ensure that the websites offer adequate support for new members and new activities.

Existing Properties

A small number of existing online properties/systems currently serves the needs of various EG community groups, including:

- **Evergreen-ils.org** (web) - The primary Evergreen software/community website, evergreen-ils.org is a home page for the software itself as well as the greater developer community. This site, built with DokuWiki, is operated by ?? GA Pub Lib Svc ?? The site contains:
 - links to offsite demos and development resources
 - download/implementation information
 - information about connecting to the developer community (feature requests, support, etc.)
 - developers' roadmap

Note: the open-ils.org website currently redirects to the evergreen-ils.org website.

- **Planet.evergreen-ils.org** (web) - "planet" type website, serving as a blog aggregator for various EG-related third-party websites. This site is operated by dan@coffeecode.net.
- **rscel.evergreen-ils.org** (web) - Formerly a standalone website at www.rscel.org, the Resource Sharing Cooperative of Evergreen Libraries website contains resources and information for current and potential Evergreen community members. As opposed to the primary evergreen-ils.org site's resources about the EG software itself, RSCEL's resources are focused on users "before the software" (decision-makers, planning purposes) and "beyond the software" (user/implementer resources). The RSCEL site is built using Drupal 6 and is maintained by The Galecia Group with the assistance of other community members. In addition, the RSCEL site contains:
 - EG feature index/comparator (via OSOL)
 - EG feature request ("user ideas" aka enhancement tracker)
 - KCLS requirement priority application (beta)
 - EG organization/institution profile (beta)
 - content subscriptions / notifications
 - links to offsite demos and dev
- **www.launchpad.net/evergreen** (web) - The EG developer community utilizes a Launchpad service for software development functionality, including bug tracking, user support forums, and version control.

- **email lists** (email, ?web-based archive?) - In addition to providing a development-focused list for EG developers, the EG mailing lists are the primary vehicle for community-driven user support in the EG community. Email lists are provided and maintained by GA Public Library Service.
- **IRC channel #evergreen (IRC)** - The EG IRC channel on Freenode is another path for community-driven user support. Chats are currently archived onto @@@TODO-WHO

Strategic Goals and Related Requirements

- Encourage use of revamped online resources by all audiences => *Provide a well-structured (user-friendly, easy to navigate) portal for all Evergreen audience groups*
- Encourage growth of a healthy developer community => *Provide an effective developer platform for EG developers*
- Encourage a vibrant, user-driven support community for the EG support process => *Provide an effective support platform with multiple support channels for EG users*
- Encourage organic growth of the EG ecosystem => *Provide a community platform to foster relationships between existing EG users, libraries, and administrators*
- Encourage widespread adoption, where appropriate, of EG software => *Provide a centralized location for EG- and migration-related information for potential EG implementers*
- ?Provide a one-stop portal for EG news and information?
- ?

Audiences - Current and Future

It's important to consider all current audience members as well as potential future audience members when planning a website. We need to consider:

- where these users are (geographically/language/web savvy as well as where they are in the OSLS/EG adoption process),
- where they are coming from (referral links),
- what their goals are when they visit an EG property ("why are they here?"), and
- what we need to convey to them for an effective interaction to take place from our perspective ("why do we, as site planners, care if they visit" --> "what defines success for the EG web properties?").

For a more in-depth examination of "who" our audience members are, let's create a breakdown of current and potential site visitors:

- **Potential Evergreen Implementers** (aka "Decision Makers") - library staff (managers, administrators, librarians, etc.) wishing to learn more about EG and the EG migration process.
 - does this group need to be broken down into CIO/CFO vs. Tech/SysAdmin sub-groups?
 - does this need to be segmented by stage, e.g., "just curious" vs. "ready to jump in"
 - goal 0: learn about Proprietary ILS vs. OSLS?
 - goal 1: learn about Evergreen software
 - goal 2: learn about EG community
 - goal 3: interact with EG community (questions answered, migration advice, etc.)

- **Evergreen Implementers/Admins**

- are there further useful subdivisions of this audience group?
- goal 0: resolve support issues?
- goal 1: learn best practices for implementation/administration?
- goal 2: participate in a community of practice?
- goal 3: suggest modifications and enhancements to developer community
- goal 4:

- **Evergreen Developers**

- @@@TODO - obtain reqts from Dev Site planner
- Open or closed development community?

- **?Evergreen End Users?**

-- is this a viable audience group? Or are all end users "serviced" by their respective EG project (e.g., PINES)?

- **EG Community Leaders** (site admins, content publishers, community facilitators, etc.)

Site admins and community leaders will use the site more than any specific group of users, so ensuring that admin/management functionality works properly is crucial.

- goal 0:
- goal 1:
- goal 2:
- goal 3:

Outreach and Awareness

Outreach and awareness efforts to promote use of Evergreen (and the associated EG online properties) by the Potential Implementer group is encouraged.

- Is there a "Why Switch to Evergreen?" story that should be told?
- Analysis of current and potential audience: quantity, level of interest, role, etc.
- Current marketing (O&A) activities?
- Current referral/lead sources for inbound links?
- Does the website need to support any new outreach efforts, such as targeted email blasts, analytics, SEO tracking, affiliate tracking, etc.?

User Stories

User stories are a method of creating software requirements. We'll define various user groups and list, in plain English, all possible tasks and activities the user groups will perform on the site. We'll then clarify and prioritize these stories during the development process.

A) Patty Potential is a Circulation Manager at a regional public library system. Patty's libraries are currently running a proprietary ILS and she is interested in learning more about OSLS and Evergreen in particular.

- 1) Patty can easily find a centralized and authoritative EG site with a minimum of searching.
- 2) Patty can view a "one-pager" offering a high-level overview of both EG software and the EG community
- 2a) Patty can view contextual background information on Open Source Software
- 3) Patty is directed to visit a "Considering Evergreen?" web page which offers a curated introduction to EG resources, created by EG community experts. This page presents links to decision-making information in a logical order, aimed at the potential implementer. The functionality of this page is currently served by the E-ILS.org's "About Evergreen" page.
- 4) Patty can browse through a hierarchical list of resources aimed at potential implementers
- 5) Patty can use keywords and filtering to search for a specific resource aimed at potential implementers
- 6) Patty can pose questions a community of existing users, using the existing IRC channels, existing mailing lists, and/or a web-based forum
- 7) Patty can easily find a demo "sandbox" implementation of Evergreen to examine
- 8) Patty can search for an EG Service Provider based on certain criteria
- 9) Patty can search for existing EG libraries based on certain criteria
- 10) Patty can search for individuals in the EG Community based on certain criteria

B) Max Migration is a System Administrator at a regional public library system. Max's library is in the process of planning and performing a migration to Evergreen from their proprietary ILS.

- 1) Max can easily find a centralized and authoritative EG site with a minimum of searching.
- 2) Max can easily find a collection of resources targeted at libraries performing a migration
- 3) Max can search for specific resources (by keyword) concerning a specific aspect of the migration
- 4) Max can pose support questions if he encounters a problem during his migration planning or implementation
- 5)

C) Addie Admin is a System Administrator at a regional public library system that uses Evergreen ILS. Addie is tasked with ongoing maintenance, administration, and user training for her library's ILS.

- 1) Addie can easily find a centralized and authoritative EG site with a minimum of searching
- 2) Addie can learn about news and developments in the EG community
- 3) Addie can choose to be notified about news and developments in the EG community
- 4) Addie can search for specific EG-related resources by keyword or other criteria
- 5) Addie can browse a categorized collection of EG resources
- 6) Addie can participate in a user forum of other administrators to ask questions and exchange best practices
- 7) Addie can easily request a new feature that she feels would be beneficial for the larger EG community
- 8) Addie can review and comment upon new feature requests suggested by other users in the EG community
- 9) Addie can easily access the EG Bug Tracker and submit a bug report
- 10)

D) Dave Developer is a developer on the Evergreen project, employed by a consortium of EG libraries.

- 1) Dave can keep official project documentation maintained in a doc repository separate from the

overall EG resource library/collections.

- 2) Dave can see a summary of Feature Requests submitted by members of the community
- 3) Dave can see a detailed history of each Feature Request including commentary from members of the community
- 4)

E) Gertie Governance is a volunteer on the Evergreen Foundation management board's Communications Committee. Gertie is tasked with utilizing the website and user community systems to enhance growth and development of the greater EG community.

- 1) Gertie can easily generate (and export) a list of website users that have registered, filtered and sorted by role, location, and any other info useful to the CommsCommittee.
- 2) Gertie can easily add content to the website as requested by other members of the management team
- 3) Gertie can

F) Wally Webmaster is the webmaster of the newly-overhauled Evergreen web portal.

- 1) Wally can easily manage and maintain the website and associated properties, including the ability to securely delegate authority for administration to other users
- 2)

Content Recommendations - High Level

From 5/21 EGCC meeting notes:

- About (OSS, EG, EG.Community, etc.)
 - //1) get prepared to understand what EG is
 - //2) what is EG
 - //3) More about the EG.Community
- Community Directory
 - //1) find providers
 - //2) find libraries/consortia
 - //3) find people
- Development Plans (aka Wishlist)
 - //1) Feature Request system
 - //2) vs. Dev Roadmap
 - //3) Community management?
- Support
 - //1) Point to Docs
 - //2) Point to mailing list
 - //3) Point to forum?
 - //4) Point to IRC?
 - //5) Point to BugTracker
- Documentation
- Developers

Content Review - Detailed

A thorough census of existing content on all primary EG properties will help website planners categorize and prioritize resources to ensure they are easier to find for site users. Example:

ID // Name // Description (opt.) // Audience // Current location (if exists)?

001 // "Why switch to Evergreen?" // 1-page document summarizing financial and philosophical rationales for EG adoption // Decision Makers - Nontech // does not exist yet.

Note: given that this is a community organized around a piece of open source software, some of the most important content is the actual application documentation. As noted in the user stories section above, keeping the official up-to-date software documentation separate from the overall library of resources (HOWTO's, best practices, white papers, etc.) will be helpful for users searching for this documentation.