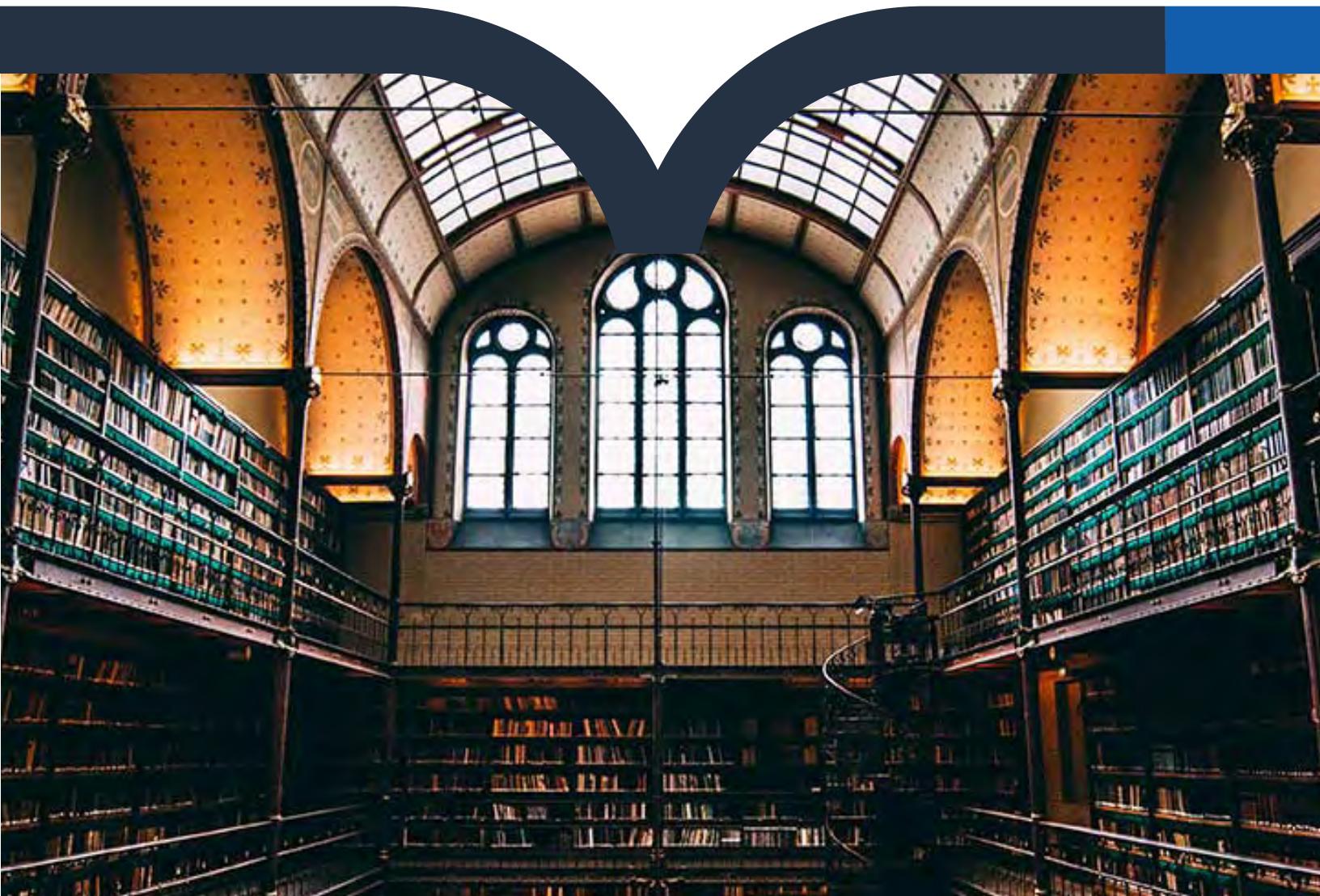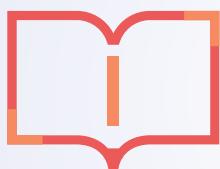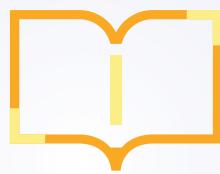# equinox
OPEN LIBRARY INITIATIVE

2020 *Year in Review*

Consulting

Migration

Software
Customization

Hosting &
Support

Training &
Education

Opening Letter from the
Executive Director

As 2020 ends, we look back on a year full of the unexpected. The Equinox team began the year attending the ALA Midwinter Conference in Philadelphia, the Ontario Library Association's Super Conference in Toronto, and the Public Library Association's conference in Nashville, TN. We were eagerly anticipating the Evergreen Internal Conference, scheduled to be in Atlanta, GA. By March, those plans gave way to cancellations, stay-at-home orders, and lockdowns due to COVID-19.

This year, instead of meeting together in person, we participated in the 2020 Evergreen International Online Conference and Koha-US as online events. We attended and supported virtual conferences across the country, provided grant funds to open source communities, and worked together with our customers to better understand how to provide support during the ongoing disruption and uncertainty of the pandemic. We developed workflows for curbside pickup services and assisted Evergreen and Koha customers with library closings and re-openings. We created and updated training and educational resources, completed twenty migration and implementation projects, and led the development of new functionality and software improvements. We were also incredibly proud to work with Biblioteca Nacional de Puerto Rico and Spark Central, the first recipients of the Equinox Open Source Grant, as they implemented Koha ILS.

As 2020 ends, we pause, reflect, and wholeheartedly express our gratitude. Thank you to each and every library staff member who faced the challenges, fear, concern, and daily news reports with dedication and persistence, and provided outstanding services to communities worldwide.

Wishing you peace and good health in 2021,

Lisa Carlucci
Executive Director

Join the Conversation

Equinox hosts a monthly Twitter chat using the hashtag #ChatOpenS. The chat brings together an international audience of librarians, training experts, developers, and open source afficionados. In 2020, Equinox invited industry thought leaders as #ChatOpenS guest moderators for the first time.

February: Life Cycle of an Open Source Feature

Moderator: Andrea Buntz Neiman

@alynnfloyd
Q6. Releases in OS communities are very driven by the community. Things like Feedback fest, Bug Squashing Week, help bring things forward in the community. Finding a need for a feature someone else created to fix a similar issue brings that forward. #ChatOpenS

@DavidNind
A6. For #kohails the testing is to make sure it works and "does what it says on the tin". The next step is the QA, where the QA Team do all sorts of things from a coding and functional perspective. Then the Release Manger reviews as well before pushing. #ChatOpenS

#ChatOpenS

March: Inter-Library Collaboration in Open Source

Moderator: Ruth Frasur

A3. Library OSS has filled in gaps in the marketplace that otherwise would not be filled because the libs that need that technology don't have the money or reputation to persuade vendors to develop tech that meets their needs. #ChatOpenS

@ulmerigel
With the kind @kohails community especially, there's a whole wide world of mentors for me & I learn so much when I have a chance to share what I've learned with others. #ChatOpenS A3

@rfrasur
A5 #ChatOpenS I'll also go so far as to say this. Evergreen ILS made my job in libraries easier. But it didn't change my life. It was most assuredly the PEOPLE involved with various aspects of #EVGILS that DID change my life and made me think about OSS more critically.

April: Open Source for Fun

Moderator: Galen Charlton

@StroupMeg
A1. When I started working with open source, part of the fun was honestly the novelty of learning an entirely different approach to cataloging (and yes, cataloging IS fun). When you add that layer of being able to tweak the ILS itself, it's double the fun. #ChatOpenS

@yo_bj
A5. If you want to fall down various rabbit holes, may I suggest cataloging rare or unique materials? ;c) Getting the chance to find out how all the pieces of the process fit in the back offices of Technical Services was 1 of the reasons why I got into librarianship. #ChatOpenS

May: How to Stay Invigorated When Working in an Open Source Community

Moderator: Rogan Hamby

@jwestonlib
Q4. Pauses (no matter how brief) between big tasks keep me going. Sometimes, physically walking away from the work space to stand outside and just listen to the birds can clear my head. Rest and time away is crucial. #ChatOpenS

@yo_bj
The fact that a lot of contributors have a day job on top of everything else doesn't help with avoiding burnout. This is really hard for folks who are newer to the project/profession and need to build up reputation. #ChatOpenS

@roganhamby
Q2. in the #evgils community, we're doing a monthly spotlight highlighting someone who contributes to the community, we especially try to spotlight people that may not be as visible or visible in their consortia but not larger community #chatopens #libraries

June: Things We Wish We Knew When We Got Started with Open Source

Moderator: Meg Stroup

@FeliciaBeaudry
A2: I didn't feel like I had anything to contribute since I wasn't a coder. I didn't realize at the time that open source communities need a lot more than people who code. They need testers, documentation writers, advocates, and so much more. #ChatOpenS

@StroupMeg
I had the same experience of fearing I had nothing to contribute, until I realized that it's not "just code." The open source world, speaking here of #evgils, seemed exclusive at first brush- but it isn't, at all. #ChatOpenS

July: New Service Models, Whether Temporary or Permanent

Moderator: Andrea Buntz Neiman

@EquinoxOLI
A3: As noted above, my local library is planning to start Curbside soon. At Equinox I'm proud of our work writing a Curbside Pickup feature for Evergreen (https://bugs.launchpad.net/evergreen/+bug/1879983). We are looking into Curbside Pickup for Koha as well. #ChatOpenS

August: Continuing Education Revisited

Moderator: Felicia Beaudry

@StroupMeg
I agree that in-person vs online presentations are extremely different. One struggle I have with online is that you can't really read the room, so it's hard to know when to slow down, when to skip over something, or when to let attendees take the wheel. #ChatOpenS

@alynnfloyd
A4. The biggest challenge is the lack of in person communication and community. Those one on one conversations that happen magically. #ChatOpenS

September: Hacking Hackfests — How They Work, How to Make Them Accessible

Moderator: Chris Cormack

@jwestonlib
Q1) Hackfest always sounds like people in a room typing away on computers with no outside interruptions, just focusing on the same project -- and that sounded quite lovely. DIY sounds a little more isolating (as in do it yourself because nobody else is around) #ChatOpenS

@ulmerigel
"DIY" day is friendlier to me, but it's been "hackfest" for so long and "hack" is such an old word, now, that it's probably more understood. But "hack" does have male & violent connotations. What is the Maori term for "hackfest?" #ChatOpenS

@alynnfloyd
Q5. Keep inviting and reminding persons that the community is not just for the developers, System Administrators, and such. Everyone has a say in a open source project. Even if it is for you to say "This does not work like I want it to". #ChatOpenS

October: Documentation

Moderator: Lynn Floyd

@yo_bj
A1. Documentation = hospitality. If the documentation is poor, outdated, or missing, it's an indicator of the community dynamics in general. #ChatOpenS

@roganhamby
#ChatOpenS Q3. Within the #evgils community I use asciidoc which I like in part because I have a large library of existing XML reports and a processor for them but otherwise I like markdown and use the OS MacDown editor to preview while I type

@andreabneiman
#ChatOpenS Q4—I do write the docs! Main barrier for many people is time (darn that stingy tuit fairy). 2nd is uncertainty about where to start. For #evgils, DIG meets the 1st Thus of the month and has a listserv—if you want to help, ask us how! https://wiki.evergreen-ils.org/doku.php?id=evergreen-docs:dig

November: Contributing and Receiving Contributions of Code

Moderator: Mike Rylander

@georgiawebgurl
I think opensource also fits nicely with library values.
[Quote Tweet @roganhamby #chatopens Q1. Rogan, do light hacking on #evgils and #kohails and grateful to have open source because I think it's an ethical choice for common development going forward, as well rational from a self interest perspective for most organizations]

News &
Features

Consolidation vs. Open Source

Acquisitions and consolidations are nothing new in the library world. Still, each one triggers a wave of shock...

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SciStarter: Expanding Knowledge with the Help of Your Library

Sometimes library patrons not only want to find knowledge at their library but expand it. One way they can do that is by contributing to...

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Herding Cats: Our Tips for Working from Home

As our Development Project Manager, Andrea Buntz Neiman, put it so aptly in our last blog post, "Equinox has been a fully-remote office for almost two years...

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Hack Your Next Open Source Conference

Conference participation can be extremely rewarding, but to get the most out of it, you have to take an active role.

READ MORE

Evergreen's Emergency Closing Handler

We know that many of your libraries are faced with the prospect of sudden extended closings. One of the newer features in Evergreen that is relevant here is the Emergency Closing Handler.

READ MORE

Tackling Unplanned Closures in Koha

In the last few days, the Koha community showed the strength of open source and community by rallying and implementing a new feature...
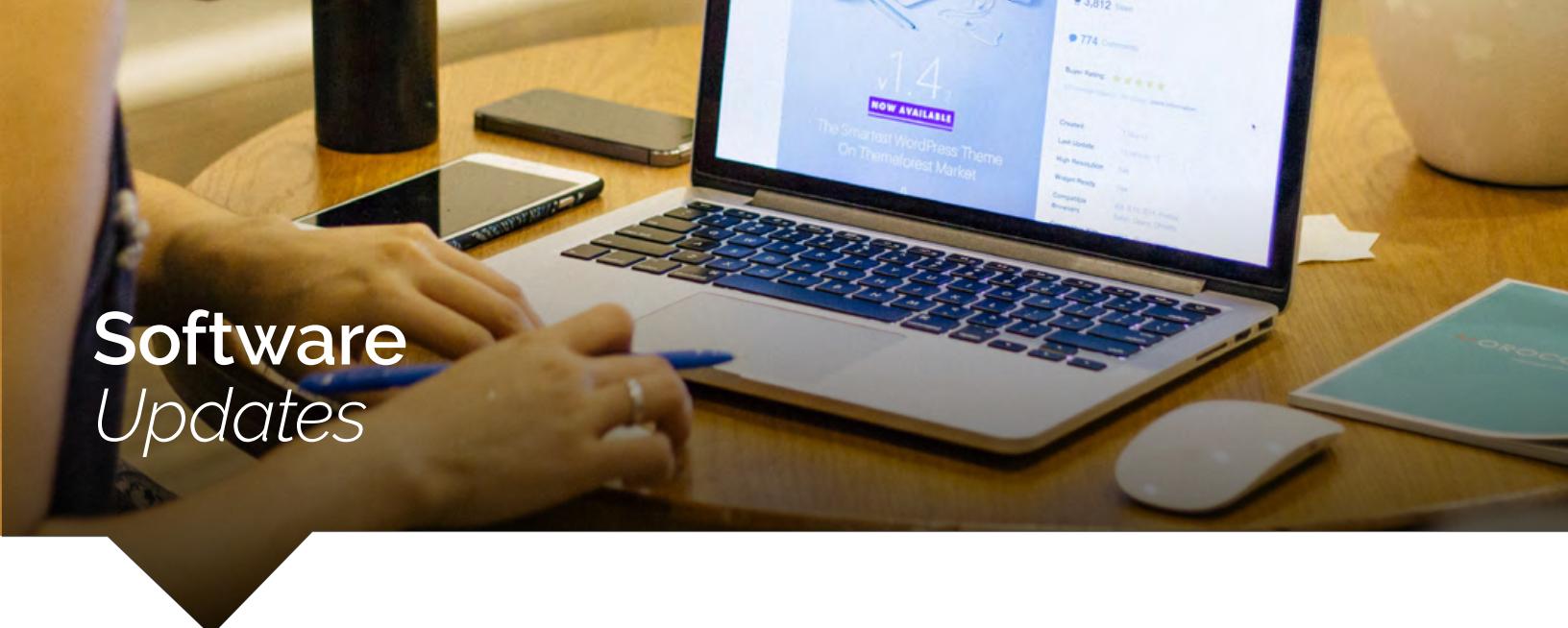
READ MORE

Conferences

	Pennsylvania Library Association In-person	**Washington Library Association** Online
	Georgia Libraries Conference Online	**Minnesota Library Association** Online
Association for Rural and Small Libraries Online	equinox OPEN LIBRARY INITIATIVE	**Missouri Library Association** Online
Public Library Association In-person	**Ontario Library Association Super Conference** Online	**Hawai'i Library Association** Online
Evergreen International Conference Online	**New England Library Association** Online	**South Carolina Library Association** Online
Urban Librarians Conference Online	**ALA Midwinter** In-person	

Software
Updates

Evergreen Software Updates

Evergreen had two major releases in 2020. Originally scheduled for the spring, the release of Evergreen 3.5.0 had been pushed back to July due to the pandemic. The new release included improvements to the billing and payment aging feature, a new Catalog Preferences interface in the Angular Staff Catalog, a new hold sort order option, and the ability to update existing hold requests when changing hold notification preferences. The release also included updates in the Angular staff catalog. Equinox's Galen Charlton wrote the announcement for evergreen-ils.org.

Evergreen 3.6.0 was released in October; Galen Charlton was the Release Manager on this project. This release included several new features, including a curbside pickup module, a course reserves module, and a new community documentation platform. The Angular Staff Catalog also became the default staff catalog. Print and Email from the public catalog were enhanced and the release included a new feature to immediately test patron SMS and Email notification methods. There was an upgrade for Stripe credit card payments and a new dedicated interface for managing Hopeless Holds. More details are included in the announcement for evergreen-ils.org.

Full release notes including a full list of new features for 3.5.0 and 3.6.0 are linked from their respective announcements.

Koha Software Updates

In 2020, as Koha version 18.11 was nearing the end of its maintenance period, Equinox upgraded all existing Koha library customers to newer releases and introduced the libraries to new Koha features and enhancements. Koha version 20.05 was released in June 2020 with new features that included enhancements to purchase suggestions, payments, fine management, and new point of sale functionality.

Throughout the year, Equinox staff members continued to provide Koha training and technical support while also participating in the Koha community. In April, members of the Equinox implementation and training teams presented at the online Kohathon conference hosted by Koha-US. In July, Equinox was featured in the Koha Community Newsletter for the successful migration of the Biblioteca Nacional de Puerto Rico to Koha, one of two 2019 Equinox Open Source Grant recipients (the other grant recipient, Spark Central, also migrated to Koha).

In August, Equinox announced completion of the latest improvement to the Curbside Pickup plugin for libraries using Koha to make the plugin available without having to pay for additional development services or waiting for a technical change to the core Koha ILS. The specifications and workflow for the new Koha plugin were designed by Equinox staff this past July to provide new staff management tools for coordinating curbside pickup services and expediting communications using the ILS.

Community
Initiatives

At a Glance

» 17 projects completed with 11 community partners

» 9 major features merged to Evergreen releases 3.5 and 3.6

Curbside Pickup

» In May and June, the Equinox team conceived, designed, wrote, tested, and released a working Curbside Pickup module for Evergreen, in partnership with PaILS. Our design for curbside was implemented by the Koha community as well.

Angular Acquisitions

» Two major pieces of the larger Angular Acquisitions project were completed in 2020. This project aims to convert Evergreen's Acquisitions interfaces into the modern web language Angular. This year, the new Acquisitions Search and Providers interfaces were released as part of Evergreen 3.6. Our partners on these projects were C/W MARS, the Evergreen Community Development Initiative, and the Indiana State Library.

FulfILLment Baseline Upgrade

» This year, thanks to sponsorship by Bibliomation, we were able to update the baseline underpinning FulfILLment, open source Interlibrary Loan software based on the Evergreen codebase, to the latest version of Evergreen. This gives FulfILLment access to many Evergreen improvements, particularly to searching and indexing.

Projects & Partners

» Curbside Pickup for Evergreen—Pennsylvania Integrated Library System

» Angular Acq Sprint 3: Acq Search—Evergreen Community Development Initiative, C/W MARS, Indiana State Library

» Angular Acq Sprint 1: Providers—Evergreen Community Development Initiative

» Single Sign On for Evergreen OPAC—BC Libraries Cooperative & Linn Benton Community College

» Did You Mean Stage 2 Single Word Single Class—Evergreen Community Development Initiative

» Triggered Events Log Rewrite—Pennsylvania Integrated Library System

» FulfILLment Baseline Upgrade—Bibliomation Inc.

» Koha Enhancements for ALVT—National Film Market/Academic Libraries Video Trust

» Digital Bookplates Consult—Pennsylvania Integrated Library System

» Override Actions in Items Out Phase I—Pennsylvania Integrated Library System

» Port LP1694058 & LP1595193 to FulfILLment—Bibliomation Inc.

» Holds Priority Consult—Westchester Library System

» Additional Action Trigger Hooks—Ann Arbor District Library

» Stripe v3 Elements—C/W MARS & NOBLE (North of Boston Library Exchange)

» Check in speed improvements—C/W MARS

» LP1174498 (Report Source for Payment Types)—Pennsylvania Integrated Library System

» Org Unit URL Enhancements—Pennsylvania Integrated Library System

Single Sign On for Evergreen OPAC

17

Development projects completed

9

Major features merged to Evergreen

FulfILLment baseline upgrade

Two Angular Acquisitions projects completed

Curbside Pickup for Evergreen

Migration &
Implementation

13

Consortial add-on projects

6

Standalone migrations

10

Distinct source legacy ILSs

9

Special data service projects

Patron records migrated

60,091

Bibliographic records migrated

507,677

636

Training participants

151

Training sessions

312.5

Training hours

**Evergreen upgrades: 30
Koha upgrades: 18**

Tickets Opened: 2,709

Tickets Closed: 2,904

Giving Back:
The Equinox Open Source Grant

The Equinox Open Source Grant was first announced in 2019, inspired by the vibrant open source community and the belief that every community deserves to benefit from a searchable, accessible, and thriving library. The grant is open to eligible libraries and archives in the U.S. that are 501(c)3 or U.S. federal, state, or local government entities with a demonstrable financial need. Preference is given to organizations that serve historically underrepresented, underserved, or marginalized populations.

Recipient organizations are provided an instance of Koha, with migration and implementation services and training. They also receive three years of hosting and support services, which can be renewed indefinitely if they continue to qualify.

The 2020 Equinox Open Source Grant recipients were Spark Central, in Spokane, Washington, and Biblioteca Nacional de Puerto Rico. Successful Koha ILS implementations were completed in July 2020 for both grant recipients. They are now utilizing a modern robust ILS to implement new services for their users and to expand access for their communities in ways that were not previously possible.

Spark Central, founded in July 2016, is a non-profit organization supporting the development of creativity, imagination, and innovation by breaking down barriers to access. Spark Central provides children and adults access to a collection of books and DVDs on a variety of topics, all intended to "shorten the distance between great creative work and a curious mind looking for something new." They also circulate creative kits that include supplies and activities guides for art and science projects and provide programming for adults and children. The pandemic has prevented Equinox from fully evaluating the impact the grant will ultimately have on their services. As of November 2020, Spark Central was providing in-person services only one day per week, for ten people at a time. Their online programming included their Drop In and Write Online program for adults and teens, their Pajama Story Time for 1- to 5-year-olds, and Kids Code Online for 3rd- to 8th-graders.

Biblioteca Nacional de Puerto Rico, the national library of Puerto Rico, operates within the Instituto de Cultura Puertorriqueña (Institute of Puerto Rican Culture) to preserve and provide access to resources related to Puerto Rico. The library includes 70,000 unique titles, with a subject focus on Puerto Rico and the Caribbean, and hosts educational activities to promote cultural awareness and celebrate Puerto Rico's rich history, art, and literature. The library is also the home to the Eugenio María de Hostos Room, a special collection of the philosopher and advocate's letters, writings, and personal belongings. Biblioteca Nacional de Puerto Rico used the Koha migration as an opportunity to reinstate and expand the digitization of their *Revista del Instituto de Cultura Puertorriqueña,* the journal of the Institute for Puerto Rican Cultura. These issues, which date back to 1958, were not accessible to users outside the library until now. The grant has also allowed the library to welcome remote users for the first time. We are excited by what they will accomplish once their services are fully restored post-pandemic.

Equinox is honored to be partnered with these inspirational institutions and proud of how the Equinox Open Source Grant has been helping them realize their full potential.

Equinox opened a second round of grant applications in November 2020. In addition to the standard qualifications, we are also considering the impact that COVID-19 has had on applicants.

Thank You!

Ann Arbor District Library

BC Libraries Cooperative

Bibliomation Inc.

C/W MARS

equinox OPEN LIBRARY INITIATIVE

Indiana State Library

Linn-Benton Community College

National Film Market/ Academic Libraries Video Trust

NOBLE (North of Boston Library Exchange)

Pennsylvania Integrated Library System

Westchester Library System

Evergreen Community Development Initiative