

2021 *Year in Review*



Consulting • Migration • Development • Hosting & Support • Training & Education

2021 Highlights



FEBRUARY 2021

[Bowling Green Public Library added to Missouri Evergreen Consortium](#)

APRIL 2021

[Equinox Launches New Website](#)

[Equinox Open Library Initiative Awards Vermont Jazz Center the Equinox Open Source Grant](#)

[Equinox Open Library Initiative Awards Center for Khmer Studies the Equinox Open Source Grant](#)

[New England Technical Services Librarians \(NETSL\) 2021 Spring Conference.](#)

["With the Time Given Us: Meeting the Challenge of Change."](#)



MARCH 2021

[Equinox Community Grant Awarded to the CORAL ERM Steering Committee](#)

[Clinton County Libraries to Evergreen with the PaLLS/ SPARK Consortium](#)

[equinoxEDU Launched](#)

MAY 2021

[Evergreen International Conference 2021.](#)

[Wainfleet Township Public Library to Evergreen with Libraries in Niagara Cooperative \(LiNC\)](#)



EVERGREEN
International Conference 2021

JUNE 2021

[CORAL Summit Hosted by Equinox](#)

[SubjectsPlus Content Management Software Introduced to Equinox Offerings for Libraries](#)





JULY 2021

[Resource Guide for Developing Open Source Tools for COVID-19](#)



AUGUST 2021

[2021 American Library Association Annual Conference](#)

["ALA 2021 – Developing Open Source Tools to Support Libraries During COVID-19."](#)

[Henry County Library to Evergreen with the Missouri Evergreen Consortium](#)

SEPTEMBER 2021

[2021 Koha-US Annual Conference](#)

["The Versatility of Authorized Values"](#)

[Equinox Joins EveryLibrary's 5K Your Way for Libraries](#)

[James Memorial Public Library to Evergreen with the Missouri Evergreen Consortium](#)

OCTOBER 2021

[Internet Librarian 2021](#)

["Transforming Services in Response to COVID-19."](#)

[Fulfillment Version 10.0 Announced](#)

[Rolla Public Library to Evergreen with the Missouri Evergreen Consortium](#)

NOVEMBER 2021

["Updating the VuFind ILS Driver for Evergreen ILS."](#)

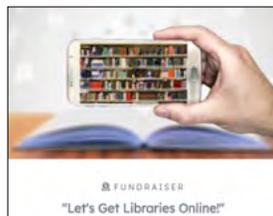
["Let's Get Libraries Online!"—Equinox Raises Funds for Library Websites](#)

[Pearisburg Public Libraries to Evergreen with the Virginia Evergreen Libraries](#)

DECEMBER 2021

[Facing the Future of Resource Sharing, Amigos Library Services](#)

[A Tiny Library with a Million Volumes: the Open Source Future of Resource Sharing](#)



Community Building

#CHATOPENS

Equinox is a leading voice in open source library technology. Over the last year we have hosted conversations, invited guest moderators, and participated in presentations to engage with our community of librarians, software developers, and users to provide the latest updates, educational opportunities, and support.

February—Virtual #OpenSource Conferences

Moderator: Andrea Buntz Neiman

@andreabneiman

Just keeping the chat moving—feel free to continue to respond to earlier questions. Q3: Have you been involved in planning or running a major online event in the last year? Was it the first time you've planned one, or is this old hat? [#ChatOpenS](#)

Q3 (long answer incoming!) 1/4: Yes! Last year's in-person [#evgils20](#) was cancelled after extensive planning. Myself & other members of the [@EvergreenILS](#) Outreach Committee were able to put together an online event which included the scheduled keynote speaker... [#ChatOpenS](#)

Q3, 2/4: ...and almost every scheduled presentation. The original committee gave us a great head start but I'm really proud that Outreach Comm was able to pull that off in less than two months—it was definitely a community effort.

[#ChatOpenS](#)

March—All Things Search

Moderator: Rogan Hamby

 Equinox OLI
@EquinoxOLI

First question - Q1: This one is just a warm up but people tend to waffle on because no one wants to say that any user is less important but if you have to pick one - which matters more, search for casual users or power users? [#ChatOpenS](#)

Q1

Let's start with a topic that people tend to waffle on because no one wants to say that any user is less important but if you have to pick one - which matters more, search for casual users or power users? [#ChatOpenS](#)

April—Cybersecurity

Moderator: Becky Yoose

@yo_bj

Last one! Q5: What are some sources that you rely on for cybersecurity news, training, and resources? [#ChatOpenS](#)

Q5 very short list: [@schneierblog](#), [@TheRegister](#), [@BleepinComputer](#), [@SwiftOnSecurity](#) Check out [#ShareTheMicInCyber](#) for a lot more folks to follow! [#ChatOpenS](#)

May—#OpenSource Project Prioritization

Moderator: Jennifer Weston

@jwestonlib

Q1 Generally, I consider Urgency and Importance but both of those terms can be vague and highly subjective; There are lots of variations on a prioritization matrix but this is my favorite (because of the simplicity). [#ChatOpenS](#)

June—Librarians & IT Professionals

Moderator: Galen Charlton

@gmcharlt

First question—Q1: Do you identify as a library worker? Or as an IT worker? Or both? (Neither?) Do you see any tensions between those identities? [#ChatOpenS](#)

July—#Fulfillment, and #opensource

Moderator: Andrea Buntz Neiman

@andreabneiman

Q1: So, the term "open source" is tossed around a lot, but a good metric of the actual openness of the project is the openness of its code. Our code is right here: <https://github.com/EquinoxOpenLibraryInitiative/fulfillment> [#ChatOpenS](#)

August—#CORAL, Community & #ERM

Moderator: Xiaoyan Song

@xsong9

Q4: What's your biggest challenge in electronic resources management? [#ChatOpenS](#)

September—Open Source Solutions for Home & Library

Moderator: Katie Greenleaf Martin

@tkatie217

Fitting in one more—Q5: Have you introduced any colleagues/friends to OSS? What was your elevator speech? How can we grow the community of OSS adopters & contributors? [#ChatOpenS](#)

October—Collaboration

Moderator: Felicia Beaudry

@FeliciaBeaudry

What did we do before there was the ability to share documents?! It was such a slow and tedious process to get feedback. I'm surprised we ever got anything done! [#ChatOpenS](#) [#collaborativedocsrule](#)

November—Folio vs. Koha Communities Compared

Moderator: PTFSEurope

Q2: Do you attend community meetings and are they worthwhile? Is there anything you'd change about the way these meetings are run? [#ChatOpenS](#)

CONFERENCE CONVERSATIONS

Virtual conferences have extended accessibility to many conferences and it increased Equinox's ability to get beyond the booth and participate. Here are some of the conference highlights from 2021!

Equinox Tweets @

#ALAMW21

Librarians using their research skills to help contact tracing is something that didn't occur to me but is really interesting. [#ALAMW21](#)

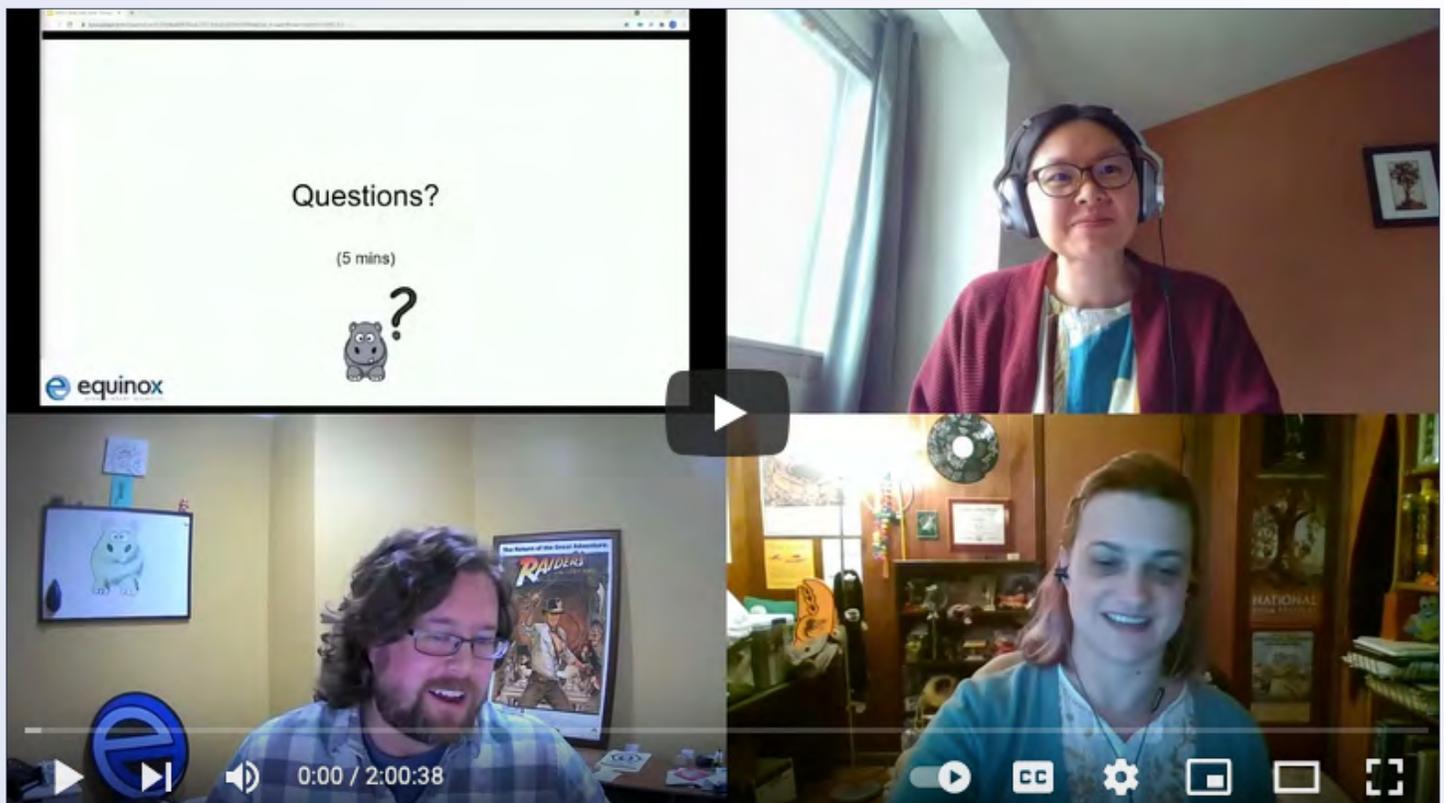
#OLASC

Loving that this session is asking questions of attendees: "Tell us about your accessibility role at your institution." Currently live tweeting from "From Accessibility to Inclusion: Improving and Expanding Library Accessibility Services" at [#OLASC](#).

#NISOPlus21

In case it comes in useful isn't enough to pass the bar for data gathering about individuals.—Andrew Cormack [#NISOplus21](#)—I agree and it means we need to think really hard up front about what we might need out of data and not just spread as broad a net as possible. [#privacy](#)

Flexibility of customization, coherent feature set, embedding your vision are all other benefits of open source vs. proprietary. "Open source software provides opportunity for libraries to embed their own vision for the future." [@bohyunkim](#) [#NISOPlus21](#)



Angela Kilsdonk, Andrea Buntz Neiman, and Mike Rylander present at the 2021 Evergreen International Conference

#LJSummit

Discussing the difference in responses in libraries based on community response to [#COVID](#). Can you even open? Do you have enough staff? [#LJSummit](#)

#c4l21

Lessons learned in the metadata cleanup project: "Taking breaks improves documentation" and "Communication is key for maintaining fluid progress." Paige Morfitt [#c4l21](#)

#evgils21

Jennifer Bruch: [@EvergreenILS](#) allows you to set OPAC maintenance messages & email messages to help us communicate w/ patrons during [#COVID](#). Helped us let them know what to do when we were reopening. [#evgils21](#)

Jennifer Bruch, ILS Application Specialist, Pennsylvania Integrated Library System

[@yo_bj](#): the data you decide to collect affects what will be exposed when there is a breach. We can mitigate risk by limiting data collection to just what is needed. [#evgils21](#) [#evgils](#)

#CORAL21 Summit

[@jwestonlib](#): say hello to CORAL. It's a stable, proven tool over 10 years old. No extensive training needed. [#CORAL21](#) [#tech](#) [#opensource](#)

[@xsongg](#): What we like about CORAL is that it is so flexible. [#CORAL21](#) [#opensource](#) [#electronicresource management](#) [#oss](#) [#librarytech](#) [#tech](#) [#libtech](#) [#writethedocs](#) [#code4lib](#)

#atla21

["@kdlitwakphd](#): "Q: "What is 'low hanging fruit' for small libraries to increase accessibility?" 1. Include captions in videos 2. Instructions on copiers, scanners, etc.—Text in larger than 10 point font 3. Provide audio transcripts of videos. [#atla21](#)

#ALAAC21

[@LibnOfCongress](#) asking [@TheAmandaGorman](#) and [@lorenlong](#) about what they have to say for adults and librarians who will be reading the book—Amanda says she hopes the adults will see themselves in it too and walk next to children with the journey they are on [#alaac21](#)

#KohaUS2021

Venesia Adams starts with a great question: What is Curbside Delivery anyway? Answer: Libraries are DELIVERY HEROES because service still has to be delivered—no matter what. [#kohaUS](#) [#kohaUS2021](#) [#KohaILS](#)

Global System Preferences Search is one of Erica's fave [#kohails](#) features. What's yours? [#kohaUS](#) [#kohaUS2021](#)

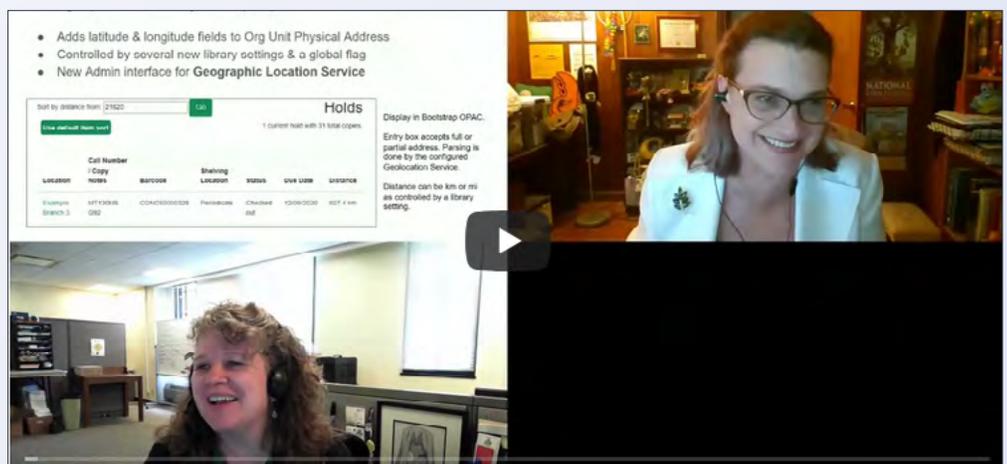
#AllThingsOpen

Permissive licenses = give me (i.e., original licensors) credit. Weak Copyleft licenses = give me fixes. Strong Copyleft licenses = give me everything.

Presenter: [@jimjag](#)

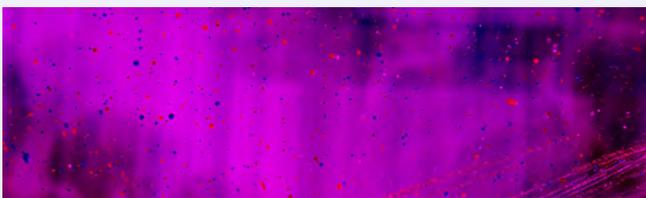
(At Equinox, we work with software like [@kohails](#) and [@EvergreenILS](#) that are under the GPL license, which is a strong copyleft license in Jim's groupings) [#AllThingsOpen](#)

*Andrea Buntz Neiman and
Ruth Frasur (ECDI Coordinator,
Indiana State Library)
present at the 2021 Evergreen
International Conference*



Education & Outreach

CONFERENCE PRESENTATIONS

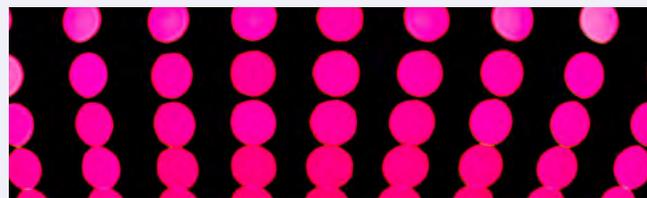


NETSL 2021 Spring Conference

With the Time Given Us: Meeting the Challenge of Change

Presenters: Felicia Beaudry and Jennifer Weston

Abstract: These are challenging times and libraries are rising to the challenge. Rather than seeing stumbling blocks, many libraries are creating stepping stones toward even stronger organizations. What can we all learn from them and how do Technical Services departments play a critical role? Join us as we discuss examples of how libraries have optimized opportunities and partnerships to make collections more accessible, expand what we think of as our communities, and become better prepared to serve them.



2021 Evergreen International Conference

Implications of Earwyrms for Evergreen Metadata

Presenter: Galen Charlton

Abstract: Library metadata can be full of dragons if not carefully tended to. During this presentation, Galen Charlton will demonstrate tools and techniques for identifying, measuring, and fixing problems with metadata in your Evergreen catalog.



Hungry Hungry Space Hippos

Presenters: Angela Kilsdonk, Andrea Buntz Neiman, and Mike Rylander

Abstract: This session will answer the ever elusive question: How do holds work in Evergreen? In this session we will take a deep dive into the mechanics of hold fulfillment in Evergreen: targeting and opportunistic capture.



Connecting Evergreen to External Services

Presenter: Rogan Hamby

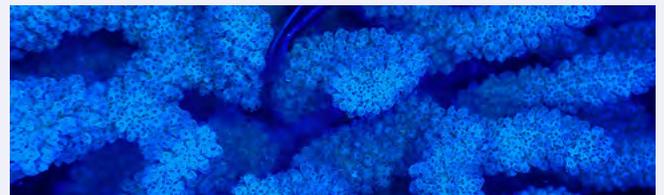
Abstract: Join us to review some of the most common ways to connect Evergreen to external applications such as extracts, SIP2, Atom feeds, and more. This presentation is for local library staff who may not be familiar with the technical aspects of the Evergreen server but need to communicate with help desks and vendors.



Picture Perfect

Presenters: Jennifer Weston; Kate Coleman (Jefferson County Library, Missouri Evergreen)

Abstract: Did you ever wonder why a bib record has an unexpected icon? Where did that come from and how do you change it? Join us as we look at the Search and Icon Formats currently used across the Evergreen community to explore how they are defined and how to update a bib record to affect changes.



It's a Feature Not a Bug

Presenters: Andrea Buntz Neiman; Ruth Frasur (ECDI Coordinator, Indiana State Library)

Abstract: Join us as we delve into the featurey goodness from the 3.6 and 3.7 releases. Come hear about what's been added, amended, and Angularized in the Evergreen ILS.



Welcome to Evergreen

Presenters: Jason Boyer; Terran McCanna (PINES) and Ruth Frasur (ECDI Coordinator, Indiana State Library)

Abstract: Join us for an introduction to how the Evergreen community works together to learn from each other and to continuously improve the software and documentation through The Evergreen Project governing board, interest groups, community activities like Bug Squashing Week, and coordinated development activities.



Ask Not What Evergreen Can Do for You

Presenters: Rogan Hamby; Jennifer Weston; Terran McCanna (PINES); Tiffany Little (PINES); Elizabeth Thomsen (NOBLE); Jessica Woolford (Bibliomation)

Abstract: A panel discussion of the wranglers of the Outreach, Cataloging, New Dev, Reports, Student Success and Acquisition interest groups discussing how people can become involved in the community and groups.



Unpredictability is the new Predictability

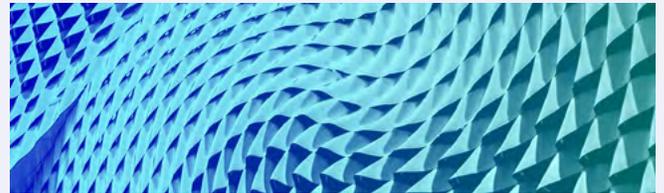
Presenter: Erica Rohlfs

Abstract: From creating a new Serial Item Template to receiving an issuance, this session will be a complete walkthrough of the Evergreen Serials Interface. This presentation will focus on one Serials workflow and adding a special issue.

STAFF CHR

Presenter: Erica Rohlfs

Abstract: In this presentation, we'll explore the Standing Penalties and Group Penalty Threshold modules. This presentation is meant to help circulation end users understand why they see some of the penalties that they see on patron accounts, and the different ways these penalties can affect those accounts.



Catalogers Organizing Locally

Presenters: Jennifer Weston; J. Elaine Hardy (PINES); Jessica Philyaw (Jackson County Public Library, NC); Janet Schrader (C/W MARS)

Abstract: The Cataloging Working Group is pleased to present a roundtable discussion about local Cataloging Committees organized within a public library consortium. Representatives from PINES, NC Cardinal, and C/W MARS will discuss the work of their local cataloging committees with a focus on structure, communication, best practices, training, and future goals.



Beyond the Stand Alone Bib

Presenters: Rogan Hamby and Jennifer Weston

Abstract: Presentation explains some ideas related to bibs that may not be obvious such as parts, peers, transcendence, and how exactly do volumes fit in the picture? We will also touch on how Evergreen calculates attributes such as search formats, how located URIs work, and how booking materials fit into things.



ALA Annual

Developing Open Source Tools to Support Libraries During COVID-19

Presenters: Lisa Carlucci, Galen Charlton, Sally Fortin, Angela Kilsdonk, Andrea Buntz Neiman, and Mike Rylander

Abstract: Libraries have been at the forefront of adapting service models to respond to community needs during the COVID-19 pandemic. This poster will present information about project planning, scope definition, design and development of content and workflows, tracking requests and feedback, and collaboration with open source community members to create and disseminate tools such as Curbside Pickup at the time of need.



2021 Koha US Annual Conference

The Versatility of Authorized Values

Presenter: Erica Rohlfs

Abstract: This session will provide an overview of predefined authorized values, how they interact with the System Preferences and the Patron Attribute Class, and creating new authorized values. Make the most out of existing and new authorized values to bring new perspective to how users can search and report on patron attributes and item collections.



Internet Librarian Connect 2021

Transforming Services in Response to COVID-19

Presenters: Lisa Carlucci, Angela Kilsdonk, Jason Goodson

Abstract: The conference presentation provides information about two rapid response initiatives led by Equinox in 2020 to support the emerging needs of libraries in the early months of the coronavirus pandemic: the launch of a remote training program for library staff, equinoxEDU, and the design of automated curbside pickup functionality for the open source integrated library systems Evergreen ILS and Koha ILS.



Rebecca Jones (Dysart & Jones), Lisa Carlucci, Angela Kilsdonk, and Jason Goodson at Internet Librarian Connect 2021



Virtual VuFind Summit 2021

Updating the VuFind ILS Driver for Evergreen ILS

Presenter: Galen Charlton

Abstract: Equinox Open Library Initiative is working on updating the 2009-vintage Evergreen ILS driver to support recent versions of the Evergreen ILS. This presentation presents VuFind® as a front end for Evergreen and is suitable for developers seeking technical information on developing ILS drivers for VuFind® and all interested in learning about using VuFind® with Evergreen.



Amigos Library Services—Facing the Future of Resource Sharing, December 8, 2021

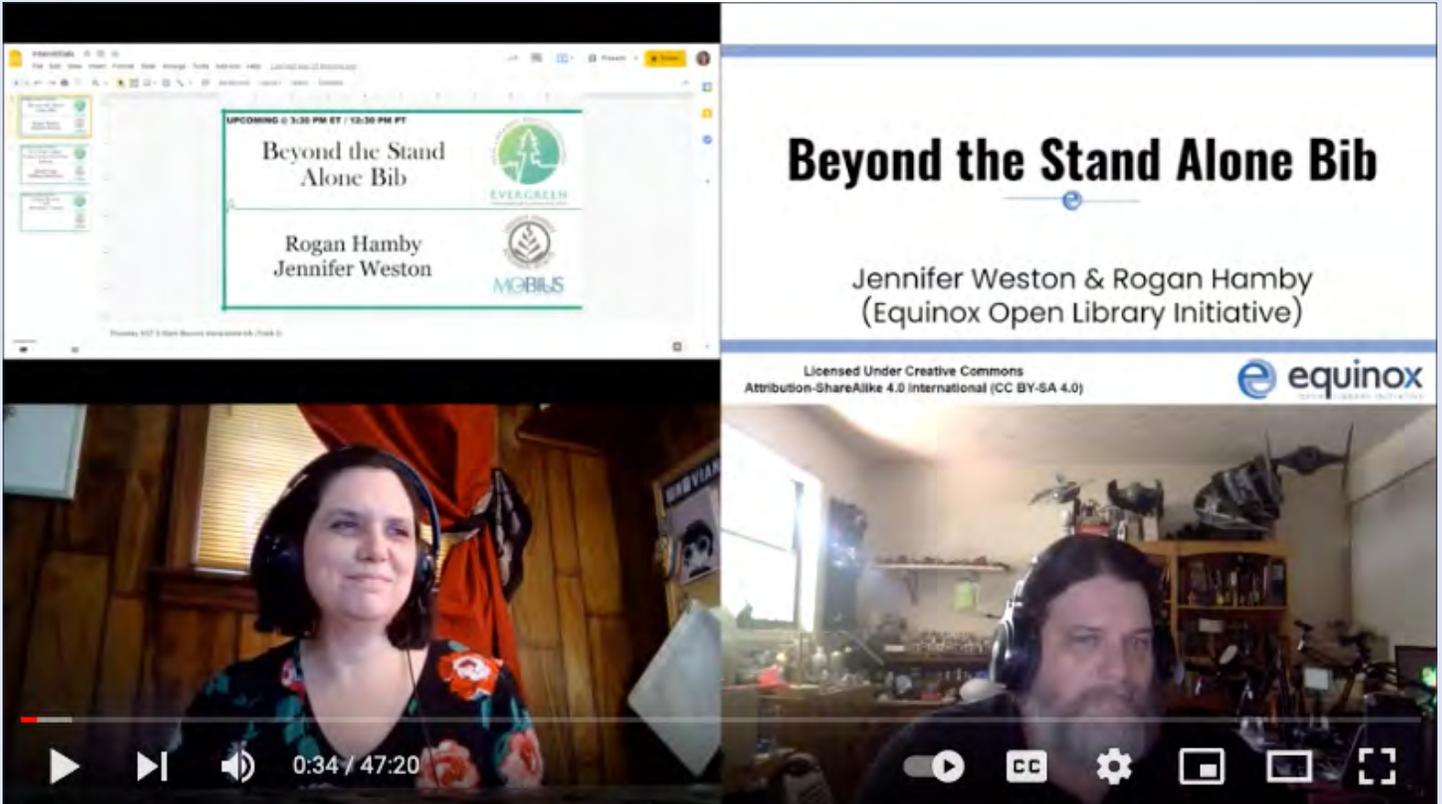
A Tiny Library with a Million Volumes: the Open Source Future of Resource Sharing

Presenters: Rogan Hamby and Andrea Buntz Neiman

Abstract: Open source technology and libraries are a natural fit: both thrive on engaged communities, information sharing, and publicly-available resources. Open source software is well established as a cost-effective and feature-rich alternative for libraries, and the future is now for open source resource sharing. Equinox now offers Fulfillment Interlibrary Loan to libraries interested in an affordable, user-friendly resource sharing platform. Come learn about Equinox's mission as a nonprofit and about how open source can make a difference for your library.



Galen Charlton presents at 2021 Evergreen International Conference



Jennifer Weston and Rogan Hamby present at 2021 Evergreen International Conference

equinoxEDU

The equinoxEDU program was launched in February of 2021 as a suite of online educational services to meet the needs of open source library communities. Online services offered by the equinoxEDU program include: the Spotlight webinar series, educational Workshops, and an accompanying Resource Library. The equinoxEDU team created and maintains an online equinoxEDU: Events Guide, using the open source tool SubjectsPlus, to share materials from past equinoxEDU programs and to announce future events.

All equinoxEDU: Spotlight sessions are made freely available to anyone and are presented as one hour webinars by subject matter experts on a variety of topics. Each webinar is recorded and made available online. Links to the recordings can be found in the equinoxEDU: Resource Library and in the equinoxEDU: Events Guide. Any materials shared in advance with registrants or during the webinar are also added to the Events Guide to be shared with the community.

Topics for equinoxEDU: Spotlight sessions this year included reviews of new release features in both the Evergreen ILS and the Koha ILS. Sessions to spotlight specific ILS functionality were presented on subjects such as the Evergreen Booking Module and the Koha Housebound module. Additional Spotlight webinar offerings featured presentations on other open source resources such as new Fulfillment interlibrary loan software, SubjectsPlus library guides, the CORAL electronic resources management system, and Patron Engagement using a Patron Information interface (API) with third party services. To date, there have been more than

1,000 views of the spotlight sessions by either an attendee at a live event or by a visitor to the Resource Library to watch the recorded content.

The equinoxEDU: Workshop sessions began in November with an initial series of workshops focused on the Evergreen Reports module. Each two-hour workshop session has a limited number of attendees to allow for optimal interaction. Access to the recordings of the workshops is only available to those who register for the workshop. Materials are provided to registrants in advance to review along with a portal to submit questions to the presenters before the workshop. Training practice opportunities are provided during the workshop and for a period following the workshop to facilitate timely follow-up to participant questions and comments.

In 2022, specific equinoxEDU: Workshop sessions that are in high demand, such as those on Evergreen Reports, will be offered on a recurring basis to create opportunities for more participation. In addition to continuing the Spotlight and Workshop sessions, planning is also underway for integrated sessions on specific topics designed to be cohort-based courses. New equinoxEDU material will continue to be available each month. Interested parties are encouraged to sign-up for the Equinox mailing list at <https://www.equinoxoli.org/#signup> to receive information about upcoming events.



equinoxEDU instructors: Andrea Buntz Neiman, Jennifer Weston, Angela Kilsdonk, Felicia Beaudry

equinoxEDU: Spotlight on Evergreen 3.6

- » **February 24, 2021**
- » Instructor: Angela Kilsdonk, Product and Education Manager
- » Abstract: This webinar covers new features in Evergreen 3.6 including the new staff catalog, the new Course Reserves feature, and how to identify and manage unfillable holds.

equinoxEDU: Spotlight on the Evergreen Booking Module

- » **April 28, 2021**
- » Instructor: Angela Kilsdonk, Product and Education Manager
- » Abstract: The Booking module in Evergreen facilitates reservations for library resources such as meeting rooms, equipment, and cataloged materials. This webinar will provide an overview of how to configure the Booking module for use and will walk through workflow examples.

equinoxEDU: Spotlight on SubjectsPlus

- » **June 30, 2021**
- » Instructor: Felicia Beaudry, Product and Education Specialist
- » Abstract: This webinar will provide an overview of how SubjectsPlus can be used to create modern web pages for libraries to promote library resources, create unlimited topic and subject guides, and organize video content. Also learn how Equinox offers SubjectsPlus as a hosted solution, providing hosting, installation, and IT services to help libraries implement SubjectsPlus.

equinoxEDU: Spotlight on CORAL ERM

- » **August 25, 2021**
- » Instructor: Angela Kilsdonk, Product and Education Manager
- » Abstract: Say goodbye to your spreadsheets and hello to an open source solution for managing electronic resources! This webinar will provide an overview of CORAL's modules for managing electronic resources, acquisitions, licensing, vendors, and reporting. CORAL is a great tool for libraries of all types to manage the increasing complexities of electronic resources.

equinoxEDU: Spotlight on Evergreen 3.7

- » **October 27, 2021 and October 28, 2021**
- » Instructor: Jennifer Weston, Product and Education Specialist
- » Abstract: Session highlights some of the newest features in version 3.7 of Evergreen and updates from recent releases. Topics will include a look at Library Groups, Hold Groups, Patron Hold Notification options, and the new "Did You Mean?" Single Word Search Suggestions functionality.

equinoxEDU: Spotlight on Koha 20.11

- » **March 31, 2021**
- » Instructor: Felicia Beaudry, Product and Education Specialist
- » Abstract: This live webinar will highlight some of the newest features and enhancements to Koha's Cataloging, Circulation, Acquisitions, and Course Reserves modules.

equinoxEDU: Spotlight on Home Delivery with Koha's Housebound Module

- » **May 19, 2021**
- » Instructor: Felicia Beaudry, Product and Education Specialist
- » Abstract: The Housebound module helps facilitate home delivery services to provide accessible library services to your patrons. This webinar will provide an overview of how to configure the Housebound module, including how to manage deliverers and selectors for home delivery materials.

equinoxEDU: Spotlight on Fulfillment

- » **July 28, 2021**
- » Instructor: Andrea Buntz Neiman, Project Manager for Software Development
- » Abstract: Introducing Fulfillment, a fully open source ILL system, which can be used alongside or in connection with any integrated library system. Fulfillment is a modern resource sharing platform that supports the needs of public and academic library consortia. This webinar will provide an overview of the ILL workflow in Fulfillment, as well as a discussion of configuration options.

equinoxEDU: Spotlight on Customer Engagement with Patron Point

- » **September 29, 2021**
- » Instructor: Andrea Buntz Neiman, Project Manager for Software Development
- » Guest: Ian Downie, Vice President, Growth, Patron Point
- » Abstract: Learn how Patron Point can help your library engage your patrons. Patron Point offers a full marketing pathway for your library, from signing up and onboarding new patrons, to using data to segment your audience, and tips for how to educate them about everything your library has to offer. Also, come learn about Equinox's plans to provide libraries with a seamless experience via API integration with Patron Point and other third party services.

Development

2021 Evergreen Development

In 2021, Equinox continued to be a major contributor to the Evergreen and Fulfillment codebases and the premier development shop for both products. We are on track to complete 23 development projects with 12 development partners by the end of the year, along with several major documentation improvements to Evergreen.

Equinox also completed several major features for Evergreen in 2021. Notable among them were a full rewrite of the Acquisitions Administration interface and additional work on the Acquisitions Purchase Order & Line Items interface. The latter is building upon development work started by Bill Erickson of King County Library System and Equinox's portion of both projects is funded by the Evergreen Community Development Initiative. Both projects involve rewriting Acquisitions interfaces in a modern, responsive, accessible, and web-native format and include significant usability improvements as well.

Another major development project Equinox completed in 2021 was Simple Reports. Jointly funded by CW MARS and the Missouri Evergreen Consortium, Simple Reports created a new report builder interface that guides a staff user through the process of creating and running a report, including selecting fields, choosing sort orders, and applying data transforms and filters. The Simple Reports interface is not a replacement for the full Evergreen Reports interface. Simple Reports gives access to a small subset of common reports and is intended to make the report creation process easier and less intimidating for staff who aren't experienced with using the full Reports interface.

Equinox also completed development work for several quality-of-life improvements in Evergreen, including a rewrite of the item triggered events log; improvements to the handling of checkout and renewal errors in the staff client; a client-side cover image uploader; and an interface-based way for staff to add patron photo URLs directly in the patron editor.

In addition to the above features, Equinox development staff completed work that will result in greater security for Evergreen users. This includes adding support for the latest and most secure version of the Stripe payment processor; consultation with Comprise about adding their SmartPay payment processor to Evergreen; and a full investigation of future Multi Factor Authentication options to add to the Evergreen OPAC and staff client.

Several of the above features were released in the Fall 2021 (3.8) community release of Evergreen, which saw 10 Equinox-written major features. The remainder of our 2022 development work will be targeted to the Spring 2022 (3.9) release, which is shaping up to be an equally feature rich release. As always, we couldn't have done all of this without our community funders and partners—open source takes a village!

Development Projects

Project	Contributors
Override Actions in Items Out	PaLLS (PA) 
AngAcq Administration (Sprint 2)	Evergreen Community Development Initiative 
Stripe Payment Intents	CW MARS & NOBLE (MA) 
Simple Reporter	CW MARS (MA) & MEC (MO) 
Fulfillment Bugfix	Bibliomation (CT) 
AngAcq PO & LI (Sprint 4)	Evergreen Community Development Initiative 

*Thank You
to our 2021
Development
Partners!*

Phase I & Consultation Projects

Project	Contributors
Patron Photo URL Editor	Traverse des Sioux Library Cooperative (MN) 
Purchase Alert Reports	Westchester Library System (NY) 
ChiliFresh Added Content	PaLLS (PA) 
SubjectsPlus PHP7 Support	Equinox
Triggered Events Log Rewrite (Item)	Evergreen Community Development Initiative 
Did You Mean 3: Multi Word Single Class	Evergreen Community Development Initiative 
Lost Price Library Settings	Kenton County Public Library (KY) 
AngAcq Sprint 4 Spec Revision	Evergreen Community Development Initiative 
Simple Reporter	CW MARS (MA) & Missouri Evergreen Consortium (MO) 
LP1895052 (Holds Stalling)	CW MARS (MA) 
Cover Image Uploader	Indiana State Library 
Angular Staff Homepage	Pioneer Library System (OK) 
SmartPay Integration Consult	Westchester Library System (NY) 
Multi Factor Authentication Initial Consult	CW MARS (MA) 
VuFind Evergreen Integration Work	Equinox
Pg13+ Upgrade Path Consult	King County Library System (WA)
RESTful API Consult	King County Library System (WA)
SIP2 Mediator Test Suite	King County Library System (WA)



Evergreen Community Positions:

- » Felicia Beaudry, Evergreen Documentation Interest Group
- » Jason Boyer, Evergreen Community Development
- » Galen Charlton, Evergreen Project Board, Treasurer; Evergreen Cataloging Interest Group; Evergreen Community Development
- » Rogan Hamby, Chair of the Evergreen Outreach Committee
- » Evergreen Documentation Interest Group
- » Andrea Buntz Neiman, Evergreen Outreach Committee; Evergreen Cataloging Interest Group; Evergreen Documentation Interest Group
- » Jennifer Weston, Chair of the Evergreen Cataloging Interest Group; Evergreen Outreach Committee

Evergreen Release Teams

Evergreen 3.8

Release Team:

- » Jason Boyer (Equinox)
- » Galen Charlton (Equinox)
- » Jason Etheridge (Equinox)
- » Michele Morgan (NOBLE)

Additional contributions from Equinox by:

- » Angela Kilsdonk
- » Andrea Buntz Neiman
- » Erica Rohlfs
- » Galen Charlton
- » Jason Boyer
- » Jason Etheridge
- » Jennifer Weston
- » Lisa Carlucci
- » Mike Rylander
- » Rogan Hamby

Evergreen 3.7

Release Team:

- » Adam Bowling (Emerald)
- » Galen Charlton (Equinox)
- » Bill Erickson (KCLS)
- » Terran McCanna (PINES)
- » Michele Morgan (NOBLE)

Additional Contributions from Equinox by:

- » Felicia Beaudry
- » Jason Boyer
- » Galen Charlton
- » Jason Etheridge
- » Rogan Hamby
- » Angela Kilsdonk
- » Andrea Buntz Neiman
- » Mike Rylander
- » Jennifer Weston



2021 Evergreen International Online Conference

Andrea Buntz Neiman (Conference Chair) and Rogan Hamby (Conference Committee)

The Evergreen community revolves around the annual Evergreen International Conference: the annual report is released, a spring software release comes out shortly thereafter, and traditionally new board members take their seats. Development and documentation teams get to have rare in-person working sessions at a hackfest. We all look forward to meeting at the conference as a yearly waypoint. The community has enjoyed the conference as a way to share successes, plan to overcome challenges, and build personal relationships. We also try to find the best restaurants within a short distance of wherever we are—librarians are great eaters!

As a result when we moved the conference online in 2020 due to COVID-19, we were disappointed. When we had to do it again in 2021, it hurt. Still, we had created a makeshift conference in 2020 with six weeks' notice. For the 2021 conference we had months, which felt luxurious. As in 2020, the 2021 conference fell under the banner of the Evergreen Outreach Committee. Two Equinox staff were involved from the beginning: Rogan Hamby as Outreach Committee chair, and Andrea Buntz Neiman as chair of the 2021 Conference Committee. However, two people is just not enough so soon additional help came in until we were a team of eleven from six organizations across the Evergreen community, including five Equinox staff.

In the end the effort resulted in an online conference held May 24–28, 2021. The Conference Committee applied the lessons learned from the 2020 online conference and the 2020 Hack-A-Way coupled with a little more lead time to offer a full-featured conference including pre-conference workshops, regular sessions, and interest groups, as well as unstructured “hackfest” time for both development and documentation. The tagline was “Vital Libraries, Healthy Evergreen” and, in line with that theme, the conference delved into issues of privacy and data protection as well as managing collections. Becky Yoose, founder of LDH Consulting Services, kicked off the regular conference with an engaging keynote speech entitled “The Curious Case of Library Data Privacy” which dovetailed with many of the in-session conversations throughout the next few days.

In total, 107 people attended the preconference and 295 people attended the main conference. Attendees and presenters included community members of all types. With four pre-conference sessions, 23 main conference presentations, seven working groups, we packed a lot into four days—plus a working day for coders and documentation writers. An important silver lining was the openness of the online event—with lower costs and no travel, many community members were able to attend their first Evergreen conference, and the community has expressed a desire for more online or hybrid events in the future.

The 2021 Evergreen Conference was able to raise over \$30,000 USD for the community, and also continued a tradition of enriching the community through peer education and reconnecting with each other along the way. The ongoing lessons learned will be important as we approach 2022 and find ourselves needing to plan for a third year of an online conference. Still, we really hope to do it in person (and at restaurants!) as soon as we can.



The software is a full-featured ILS with a dual-database design (search engine and RDBMS) built to be compliant with library standards. Koha's OPAC, staff, and self-checkout interfaces are all web applications. Distributed under the General Public License (GPL), libraries are free to use and install Koha themselves or to purchase support and development services.

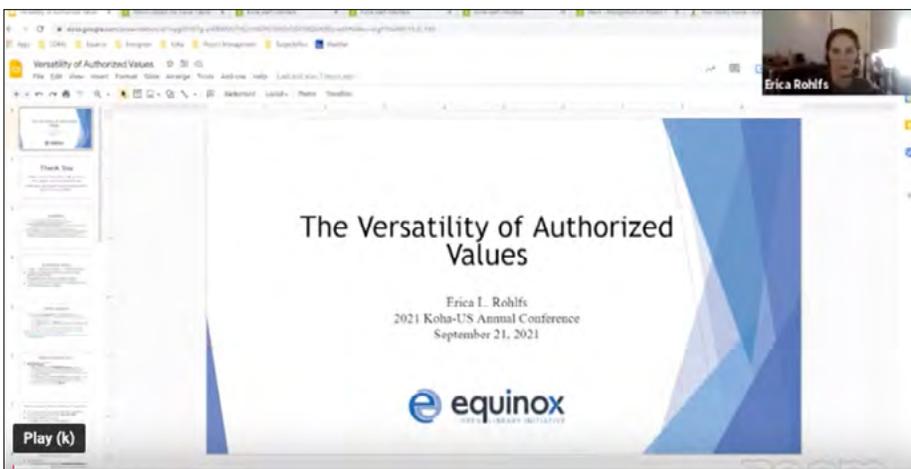
Highlights:

New Koha Libraries in 2021:

- » Academic Libraries Video Trust
- » Association of Floodplain Managers
- » Center for Khmer Studies
- » DarusSalam Seminary
- » Vermont Jazz Center

Events

- » 2021 Koha US Annual Conference
- » The Versatility of Authorized Values
 - Presenter: Erica Rohlfis
 - Abstract: This session will provide an overview of predefined authorized values, how they interact with the System Preferences and the Patron Attribute Class, and creating new authorized values. Make the most out of existing and new authorized values to bring new perspective to how users can search and report on patron attributes and item collections.
- » equinoxEDU: Spotlight on Home Delivery with Koha's Housebound Module
 - Instructor: Felicia Beaudry, Product and Education Specialist
 - Abstract: The Housebound module helps facilitate home delivery services to provide accessible library services to your patrons. This webinar will provide an overview of how to configure the Housebound module, including how to manage deliverers and selectors for home delivery materials.



Erica Rohlfis presents at the 2021 Koha-US Annual Conference.



CORAL is a free, open source electronic resources management (ERM) system that is used by libraries and institutions worldwide. The software is developed and maintained by community contributions to the project. Equinox Open Library Initiative joined the CORAL ERM open source community by participating and offering support in a variety of ways this year.

In March, the Equinox Community Grant was awarded to the CORAL ERM Steering Committee to support the communication needs of the CORAL project by funding the hosting and domain fees for the CORAL website.

In June, Equinox hosted a CORAL Online Summit as a free event for the CORAL open source community. Speakers from Europe and North America delivered presentations on how CORAL ERM is currently employed in their libraries, reviewed recent and planned future development, and facilitated discussions about how CORAL can be implemented for use in public, academic, and special libraries. The CORAL Online Summit recording is available in the equinoxEDU: Resource Library.

In August, the equinoxEDU: Spotlight series featured CORAL ERM. The free webinar provided an overview of CORAL's modules for managing electronic resources, acquisitions, licensing, vendors, and reporting. The many benefits of CORAL were touted for libraries of all types looking for an excellent open source tool to manage the increasing complexities of electronic resources. The equinoxEDU: Spotlight on CORAL webinar recording is available online and is accessible in the equinoxEDU: Events Guide.

Equinox maintains an active presence as an Affiliate Member of the CORAL Steering Committee. In addition to helping guide CORAL activities and communications, Equinox is also contributing time developing CORAL infrastructure. In October, Equinox reported their work on the jQuery upgrade was complete for the CORAL Licensing module. Equinox will continue to work on jQuery upgrades for additional modules in 2022.

Highlights:

- » CORAL ERM Steering Committee Awarded an Equinox Community Grant

Events:

- » [CORAL Online Summit](#)
- » Prospective and active users of the CORAL electronic resources management system gathered online to learn about CORAL and discuss best practices. Presenters covered how CORAL is used in public, academic, and special libraries. Full agenda.
- » #ChatOpenS: Open Source Twitter Chat with Xiaoyan Song, Electronic Resources Librarian at North Carolina State University Libraries on CORAL ERM
- » equinoxEDU: Spotlight on CORAL ERM



Fulfillment is an open source interlibrary loan management system which leverages intuitive design and efficient workflows to maximize value and impact for library users. Fulfillment takes interlibrary loan to the next level with powerful analytics – removing the need for manual tracking and amplifying collections management efforts with clear reporting that highlights collections with the most demand. Fulfillment allows community members to have expanded access to resources across their state and outside their consortium. Learn more about Fulfillment.

Highlights:

- » Equinox Announces Fulfillment Version 10.0

Events:

- » #ChatOpenS: Open Source Twitter Chat with Andrea Buntz Neiman on Fulfillment
- » equinoxEDU: Spotlight on Fulfillment
 - Instructor: Andrea Buntz Neiman, Project Manager for Software Development
 - Abstract: Fulfillment, a fully open source ILL system, which can be used alongside or in connection with any integrated library system. Fulfillment is a modern resource sharing platform that supports the needs of public and academic library consortia. This webinar will provide an overview of the ILL workflow in Fulfillment, as well as a discussion of configuration options.
- » Facing the Future of Resource Sharing, Amigos Library Services
 - ["A Tiny Library with a Million Volumes: the Open Source Future of Resource Sharing." Facing the Future of Resource Sharing.](#)
 - Presenters: Rogan Hamby, and Andrea Buntz Neiman
 - Abstract: Open source technology and libraries are a natural fit: both thrive on engaged communities, information sharing, and publicly-available resources. Open source software is well established as a cost-effective and feature-rich alternative for libraries, and the future is now for open source resource sharing. Equinox now offers Fulfillment Interlibrary Loan to libraries interested in an affordable, user-friendly resource sharing platform. Come learn about Equinox's mission as a nonprofit and about how open source can make a difference for your library.

Development

Fulfillment Version 10.0 was released in the summer of 2021, and continued to see steady development with a new round of staff interface improvements. These enhancements, funded by Bibliomation, were intended to minimize the opportunities for staff error as well as make available more detailed information to staff about request history. Fulfillment's latest release delivers powerful reporting functions and an enhanced, robust suite of tools to provide better and more streamlined services for library communities. Fulfillment's web based platform is user friendly and works with any integrated library system, saving staff time and offering significant cost savings for libraries. Fulfillment also meets collections management needs by highlighting collections with the most demand. Libraries and consortia seeking an established, modern, affordable, and scalable resource sharing system will appreciate the improvements Fulfillment offers.



SubjectsPlus provides tools to create information-rich subject guides, organize curated content for specific audiences in or around a research topic, and to develop and manage library websites with an easy-to-use interface for creating web content without web design experience. Learn more about SubjectsPlus.

Highlights:

» Equinox launches SubjectsPlus as a supported service

Development

Equinox launched support of SubjectsPlus in the spring of 2021 in order to better serve libraries and their communities who need ways to organize and disseminate content from anywhere. Over the course of the year Equinox completed two enhancements and five bugfixes for SubjectsPlus.

From subject guides, research guides, course materials, and course reserves, to classroom and curriculum content, digital and multimedia resources, online learning centers, and library websites, SubjectsPlus may be designed to support the information needs of communities. SubjectsPlus provides tools to create information-rich resources, organize curated content around a topic, and to easily develop and manage an online home for library web content.

The screenshot shows the equinoxEDU website interface. At the top, there is a navigation bar with links for Home, Guides, Databases, equinoxEDU (the site logo), Staff List, FAQs, and Talkback. Below the navigation bar, the page title is "Research Guides" followed by "Astronomy and Space Science".

The main content area is divided into three columns:

- Featured Image:** Displays an infrared image of the Helix nebula. Below the image is the caption: "Infrared image of the Helix nebula, taken by the NASA Spitzer Space Telescope in February 2007."
- Using this Guide:** Contains a welcome message: "Welcome! As the title implies, this guide is intended to help you find resources related to Astronomy and Space Science. You'll find a mixture of materials for general audiences and academic study." Below this, there is a section titled "Research - Journals and Magazines" with two links: "Amateur Astronomy" (with a note: "Preview the current issue of a magazine written by amateur astronomers for amateur astronomers. Subscription required.") and "Astronomy Magazine" (with a note: "Monthly publication of astronomy related news, color photographs, coverage of astronomical events, tips on observing the sky, telescope reviews, and more. Subscription required.")
- Featured Video:** Shows a video player with a NASA logo and the title "A Decade of S...". The video thumbnail shows a bright, fiery celestial object.

At the bottom right of the page, there is a "Search Our Catalog" section with a search input field and a "Search" button.

Giving *Back*

EQUINOX COMMUNITY GRANT

The Equinox Community Grant provides funding for open source projects and operational infrastructure in order to strengthen and support open source communities in libraries, archives, and cultural heritage organizations.

Recipient: CORAL ERM Steering Committee.

The Equinox Community Grant supports the communication needs of the CORAL project by funding the hosting and domain fees for the CORAL website for a period of ten years. The grant allows the CORAL Steering Committee to maintain their current website, share information about CORAL ERM, and to connect with present and future CORAL community members. [Read more.](#)

"CORAL, a powerful open source electronic resource management tool, is built for the community and by the community. I'm grateful for the grant from Equinox and the assistance with the CORAL summit to help the community continue to grow." **Xiaoyan Song, Chair of the CORAL ERM Steering Committee, and Electronic Resources Librarian at North Carolina State University.**

5K YOUR WAY FOR LIBRARIES

Equinox joined the '5K Your Way for Libraries' fundraising initiative by EveryLibrary, a nonprofit organization working to ensure stable funding for libraries through advocacy, education, and support. Team Equinox out fundraised their goal and finished in the top ten teams.

"Libraries in my neighborhood, and all over the country, do so much more than circulate materials. They provide programs that inspire learning and creativity. They assist people with job searches. They connect people with assistance in times of natural disaster. They act as voting precincts. If completing 5K of running, walking, or bicycling can help them continue doing those things, even in a small way, I'm happy to participate and encourage others to do the same." **Felicia Beaudry, Product and Education Specialist with Equinox.**



2021 EQUINOX OPEN SOURCE GRANT

The 2021 Equinox Open Source Grant recipients are the Center for Khmer Studies and the Vermont Jazz Center. Both libraries went live on their Koha databases on Thursday, July 15, 2021.

No strangers to open source, the **Center for Khmer Studies** was actively seeking a different open source solution when they learned of the Equinox Open Source Grant. The Center for Khmer Studies, located in Siem Reap, Cambodia, migrated its special collection of 12,951 bibliographic and item records. Their library is open to the public and free of charge. It hosts international scholars, researchers, Buddhist monks, and local students. The Library also houses a children's collection, offering younger readers a place to study and to intellectually grow. Sivleng Chhor is their Head Research Librarian, and she has intimate knowledge of every title in their rare collection. Sivleng is as much of an invaluable resource to their library, as their unique collection. Boramey Keng, another librarian who assisted with their migration, was a proactive troubleshooter and engaged in the migration process. One of their Board members located in New York, TJ Rutkowski, applied for the grant and assisted throughout their migration process. TJ's energy and technical expertise bridged several migration discussions. Together, the three of them made a phenomenal migration team with attention to detail and a willingness to sacrifice personal time to carry out a successful migration. We are excited to host a library in Cambodia on Koha.

"The CKS collection is unique and extraordinary. I am thrilled at how easily scholars in Cambodia and abroad can use Koha to explore our books, journals, and resources."

Eve Zucker, President, Center for Khmer Studies

"We are extremely honored to receive Koha migration and hosting services from Equinox. We are looking forward to expanding access to our library and catalog while supporting our community and mission."

Sivleng Chhor, Head Librarian at the Center for Khmer Studies

"I knew we needed a new tool, and Equinox made it happen with a structured process to understand our needs, migrate our data, train us, test and deliver the new system. We could not have completed this quick transformation on our own, and look forward to a long partnership with Equinox and the Koha community." TJ Rutkowski, Treasurer, Center for Khmer Studies

Eugene Uman, Ginger Morawski, John Levin, Elsa Borrero and Michael Hanish of the **Vermont Jazz Center**, had a very clear vision for the future of their Vermont Jazz Center Archives. For years, they compiled and stored several hundred records into TinyCat and NeoFinder. They were seeking an open source solution that would expose their treasures to the public. One of their visions was to establish an online catalog that organizes metadata for each of their concerts, such as a compilation of a specific concert's video clips, sound recordings, photographs, and artist interviews. Over the last several months, the Vermont Jazz Center team has steadily built their archive's online presence. During one of the final migration calls, John was describing how he cataloged a particular record representing an open reel tape of Attila Zoller performing on guitar at a New York jazz club. In that moment, it became clear just how enchanting it was to be a part of their migration and take a glimpse into their world. John and the cataloging team are presenting a moment of jazz history to the world, for others to discover and enjoy more than 30 years later. It should come as no surprise that the musical talent of the Vermont Jazz Center team can turn cataloging into a melodic experience.

"As the VJC Director, I have been overwhelmed by the responsibility of organizing this historically significant and diverse collection of media. Over the last 6 years we have put together a top-notch archive team headed by a brilliant archivist, John Levin, but we had originally opted to use a smaller ILS that would be within our budget. Levin knew that Koha would be able to handle our needs, but no one on our team had the expertise to customize our system for compatibility, nor the time to learn its breadth and depth. Levin learned of Equinox and applied for an assistance grant. The Equinox team were deftly helpful in educating our team regarding Koha's tremendous abilities. The more we investigated, the more it became clear that Equinox and their mastery of Koha was a hand-in-glove ILS solution that would serve our organization's goals. I am honored to have received this grant, but more than that I am excited about the prospect of an organized future." Eugene Uman, Director, The Vermont Jazz Center

Implementation

8

Evergreen migrations

4

Koha migrations

12

Total number of migration projects

7

Number of library systems going live

Total number of bibliographic records migrated

246,782

Total number of patron records migrated

47,289

Welcome

Bowling Green Public Library

Academic Libraries Video Trust

Wainfleet Town Public Library

Clinton County Libraries

DarusSalam Seminary

Vermont Jazz

Key Statistics

12

Evergreen library branches going live

4

Koha library branches going live

16

Total library branches going live

Number of consortial add-on projects

1

Number of distinct source legacy ILSs

9

Number of standalone migrations

12

Policy Consultations

2

Data Services Projects

4

Partnership

Center for Khmer Studies

Henry County Library

James Memorial Public Library

Rolla Public Library

Cedar County Library
Pearisburg Public Library

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