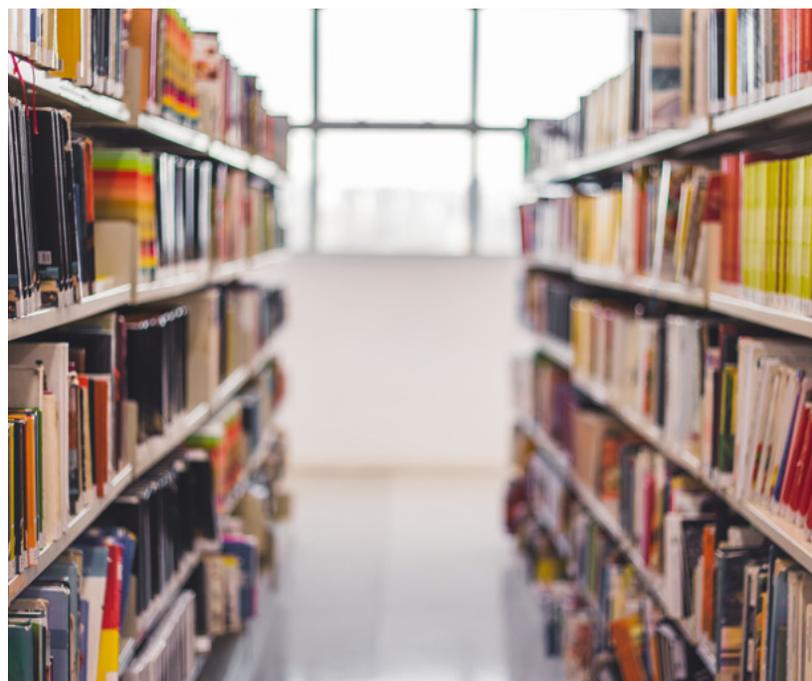




2022 *Year in Review*



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

2022 Highlights

JANUARY 2022

Development Completed

- » Angular Acquisitions Sprints 5-9 Planning, partnered with ECDI
- » OAI-PMH Data Provider Support (for 3.9-beta)
- » Angular Notifications/AT Port, partnered with LBCC (for 3.9-beta)



FEBRUARY 2022

Development Completed

- » Localized Notices in Evergreen, partnered with LBCC (for 3.9-beta)
- » Shelving Location Order Port, partnered with KCLS (for 3.9-beta)

MARCH 2022

- [VuFind® Support Announced](#)
- Camp ER&L, the Electronic Resources and Libraries 2022 Virtual Conference
 - » "CORAL ERM for Public & Academic Libraries: Low Risk, High Reward"

APRIL 2022

- New England Technical Services Librarians Conference
 - » "Be a Report Warrior & Data Analyst Hero"
- Evergreen Migration
 - » [Porter County Public Library via Evergreen Indiana](#)



Development Completed

- » Field Documentation Port, partnered with KCLS (for 3.10-beta)

MAY 2022

- Connecticut Library Association Annual Conference
- CORAL Online Summit
 - » "Community Overview & Summit Logistics", "Planting a Reef: A Checklist for Getting Started with CORAL", "Vendor Services Panel"
- Evergreen Migration
 - » [Western Pocono Community Library and Barrett Paradise Friendly Library via PaLLS](#)



JUNE 2022

- Koha ILS Migration
 - » [Ohio Center for Autism and Low Incidence](#)
- Evergreen International Online Conference



- » "Exploring and Using the Evergreen API"
- » "Filling in the Gaps: Documentation Review and How You Can Help"
- » "Imagining the Future of Collections"
- » "Going Fine Free"
- » "Open Source—Software and Beyond"
- » "Life, the Universe, and the EVERYTHING Permission"
- » "Branches on the

Evergreen Tree: New Feature Highlights for 3.8 and 3.9"

- » "Developing & Implementing Curbside Pickup Services"
- » "SQL for Librarians"
- Evergreen Migration
 - » [Ralls County Library via the Missouri Evergreen Consortium](#)
- American Library Association Annual Conference

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

Development Completed

- » Queued Ingest, partnered with KCLS, Pull Request (for 3.10-beta)
- » Deprecate Message Center, partnered with KCLS (for 3.10-beta)

JULY 2022

- [Aspen Discovery Support Announced](#)

Development Completed

- » AngAcq Sprint A, partnered with ECDI
- » Angular Report Interface, partnered with KCLS



AUGUST 2022

- Koha ILS Migration
 - » [Visual Art Library of New London](#)
- CORAL ERM and Sequoia hosting
 - » [William Jessup University](#)

Development Completed

- » Angular Link Checker Interface, partnered with KCLS
- » Angular Custom OU Tree Interface, partnered with KCLS
- » Angular Staff Catalog Accessibility Review—Report, partnered with KCLS
- » YAOUSen Port, partnered with KCLS (for 3.10-beta)
- » Cash Reports Port, partnered with KCLS (for 3.10-beta)

SEPTEMBER 2022

- Grant/Koha ILS Migration
 - » [Weeksville Heritage Center in Brooklyn, New York](#)
- KohaCon22
- Missouri Library Association Conference

Development Completed

- » VuFind® Evergreen Driver, work done for the community
- » SIP Redaction, partnered with Pioneer, Pull Request for SIP server; Pull Request pending for Evergreen
- » Missing Admin Interfaces, partnered with KCLS (Pull Request for 3.10-beta)



OCTOBER 2022

- Pennsylvania Library Association Conference

Development Completed

- » AngAcq Spring B (Invoice & Claims), partnered with ECDI



NOVEMBER 2022

- Koha ILS Migration
 - » [Lakewood Baptist Church](#)
- New York Library Association 2022 Annual Conference
- Charleston Conference Virtual Segment
 - » ["Why an ERM in a Small Library: Implementing CORAL at William Jessup University"](#)

Development Completed

- » Did You Mean 3 MWSC partnered with ECDI
- » SmartPay Integration, partnered with Westchester, Pull Request for 3.next
- » Angular Staff Catalog Bib Interface, partnered with CW MARS



DECEMBER 2022

Development Completed

- » Koha Connector, work done for the community
- » Angular Staff Catalog Accessibility Review—Remediation, partnered with KCLS
- » Statistical Categories Port, partnered with KCLS
- » SIP2Mediator Consultation, partnered with KCLS
- » Security Consultation, partnered with CW MARS
- » Circulation Policies Port, partnered with KCLS
- » PaILS Penalty YAOU, partnered with PaILS
- » Parts Bugfix, partnered with EGIN

Welcome *New Equinox* Team Members



BRENNA ALLEN

Position: Support Specialist

Brenna Allen is a Support Specialist that received her MLS from Emporia State University. She has worked in public libraries, archives, and for library vendors. Most recently, she worked for Jefferson County Colorado's Library in their outreach department supporting the bookmobile, holds lockers, homebound patrons, and their first staffless library. Her involvement with the staffless library and its associated systems reinvigorated her interest in library technologies, and that led to her joining Equinox.

Brenna enjoys gardening, virtual reality games, volunteering for community organizations, and catching as many concerts as possible.



STEPHANIE LEARY

Position: Front End Developer

Stephanie Leary brings over twenty years of web and software interface design to the position in addition to technical writing and training experience. Stephanie graduated from the University of Washington with a Master of Library and Information Science. When not volunteering with StoryGraph or Archive of Our Own, Stephanie enjoys bookbinding and subversive cross stitch.



ALLISON MATHERNE

Position: Program Assistant

Allison Matherne spent the last five years working in public libraries providing circulation and references services as well as planning and leading library programs and storytimes. Allison graduated with a BA in English from the Louisiana State University in Baton Rouge where she worked in the University's architecture and graphics design computer lab, providing technical support to academic researchers and students.



ANDY UTTERBACK

Position: Business Development Manager

Andy Utterback has worked in and around libraries for ten years, serving in a variety of roles. Prior to joining Equinox, Andy served as the Senior Manager of Strategic Partnerships at the Public Library of Science (PLOS), as the Content Management Librarian at SUNY Maritime College, and as an Institutional Development Manager at ITHAKA. His work focuses largely on spreading the word about the benefits of open technologies, data, and resources used by libraries and library patrons around the world. Andy received his MLS from Indiana University.

Community *Building*

#ChatOpenS

A monthly brainstorming and networking event hosted by Equinox to bring together the open source library community. This year it was hosted by more guest moderators than ever before, including the [Open Rules for Cataloging](#) group, and inspired at least one conference presentation at the 2022 Evergreen International Online Conference. Catch up on our past year of topics below.

MARCH: Technical Debt

Moderator: Andrea Buntz Neiman

[@andreabneiman](#)

A5: Two that caught my attention recently were documentation debt, and learning debt. The first because I'm involved with the [@EvergreenILS](#) docs group, and I saw this tweet by [@tabdido](#) that stuck in my brain: <https://twitter.com/tabdido/status/1488315088356392975> [#ChatOpenS](#)

A5 ctd: Learning debt is more hidden but is a cumulative drain on projects—sharing knowledge is key! This report by [@grimalkina](#) describes why learning should be better supported in dev teams: <https://bit.ly/3tcdfSV> [#ChatOpenS](#)

APRIL: Project Management in Open Source Environments

Moderator: Katie Greenleaf Martin, PaLLS

[@tkatie217](#)



Q4: Project management has a lot of jargon that can be intimidating - how do you try to be inclusive in your language? [#ChatOpenS](#)

Q4

Project management has a lot of jargon that can be intimidating - how do you try to be inclusive in your language? [#ChatOpenS](#)

@tkatie217: [@roganhamby](#) [#ChatOpenS](#) when I first started working with Evergreen development, i found some of the agile terminology pretty intimidating—'sprint' isn't a hard concept but if you don't know the lingo it seems like it is

MAY: Your #OpenSource Origin Story

Moderator: Elizabeth Davis, PaLLS

@EquinoxOLI: Fitting in one more—Q5: How has working with open source software changed your outlook about working with software? [#ChatOpenS](#)

@tkatie217: [#ChatOpenS](#) when I talk about f/oss at home, i typically talk about stability—machines that don't have to be rebooted / restart for updates / just plain broken. our linux setup at home just works



JUNE: Open Source Online Conferences

Moderator: Jennifer Weston

@jwestonlib

Q1: One of my favorite online conference interactions—shared documents and bulletin boards; let's take notes together instantly. [#ChatOpenS](#)



JULY: Developers and Librarians—how can we work on open source together?

Moderator: Veethikaa, GitLab

@equinoxOLI: in my opinion the first step towards great collaboration is to understand the need for collaboration and the value of what each stakeholder could bring to the table.



Equinox OLI
@EquinoxOLI

...

Let's get started w/ Q1:
What bridges could we build between our fields? What jargon/barriers or gatekeepers get in the way? [#ChatOpenS](#)

Q1

What bridges could we build between our fields? What jargon/barriers get in the way? [#ChatOpenS](#)



AUGUST: Open Rules for Cataloging

Moderators: Denise Soufi, Ann Kardos, Julie Moore

This is the first [#ChatOpenS](#) where we highlighted another [#opensource](#) project. The Open Rules for Cataloging (ORC) project was initiated in 2019 by Amber Billey of Bard College to create open access cataloging rules for the cataloging community. To learn more about the project, check out their [GitHub wiki](#).

@EquinoxOLI: Q1. Easy to understand rules are one of the main impetuses for the formation of ORC. We also want it to be responsive to catalogers' needs, which include societal changes.

@ulmerigel: My opinion: let's try to get rid of assumption that cataloging codes have to be complex—tagging & coding languages are not all complex & can do complex things. [#ORC](#) can be simple & have buy-in from world of people who can't afford [#RDA](#). [#ChatOpenS](#) (& I am an actual cataloger).



SEPTEMBER: Onboarding New People to #libtech and #libraryOSS

Moderator: Galen Charlton



Q2: One aspect of job interviews is that the employer interviews the candidate... and the candidate interviews the employer. Analogizing with library #floss, what do you look for when you "interview" an open source project? #ChatOpenS

Q2

One aspect of job interviews is that the employer interviews the candidate... and the candidate interviews the employer. Analogizing with library #floss, what do you look for when you "interview" an open source project? #ChatOpenS

@kmlussier: Is there a culture where institutions and service providers understand the value of contributing to the community? Are people respectful to each other, willing to help each other out? I could go on and on...#ChatOpenS

@kmlussier: We've found that mentors have been helpful with the large number of new directors we've seen in our consortium lately. I could see a similar program working well in an oss project. #ChatOpenS

OCTOBER: Sustainable Model for the Longevity of Open Source Communities

Moderator: Xiaoyan Song



Q2: Sustainability has been a major challenge for open source projects. Are you aware of any open source projects that are doing well in terms of sustainability? #ChatOpenS

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Sustainability has been a major challenge for open source projects. Are you aware of any open source projects that are doing well in terms of sustainability? #ChatOpenS

NOVEMBER: Open Source Advocacy—Making a Case for #OSS

Moderator: Laura Barry

@equinoxOLI: Notable myths listed: #opensource is less secure, #oss is too complex, there isn't any support (this chat proves that at least there is support for #libraryOSS). #ChatOpenS

@RoganHamby: Was talking to a library I migrated this morning and they said when they first chose to go Open Source staff thought it would be green text on black screen old school stuff. Once they saw it they were so happy with how modern and user friendly it was. #chatopens

*We look forward to
#ChatOpenS with you
in 2023!*

CONFERENCE CONVERSATIONS

Equinox Tweets @

Equinox Tweets @ #2022MLA: Creation of a Consortium, Cataloging Course

@EquinoxOLI: There were some sources of anxiety for the trainees: learning cataloging from scratch for some—some were going from unautomated catalogs during the process—dealing with mechanics of sharing screenshots as they progressed—time required [#2022MLA](#)

Equinox Tweets @ #KohaCon22: Koha and Open Source at the King's Fund Library

@EquinoxOLI: "Fear, Uncertainty, Doubt" were spread by proprietary vendors in the face of searching for an [#opensource](#) solution.—Matthew Hale. [#kohacon22](#) [#kohails](#) [#oss](#) [#FOSS](#) [#libraryFOSS](#)

@EquinoxOLI: [#kohails](#) adoption embodied our resilience"—Matthew Hale. Speechless. Well said. [#kohacon22](#) [#oss](#) [#FOSS](#) [#libraryFOSS](#)

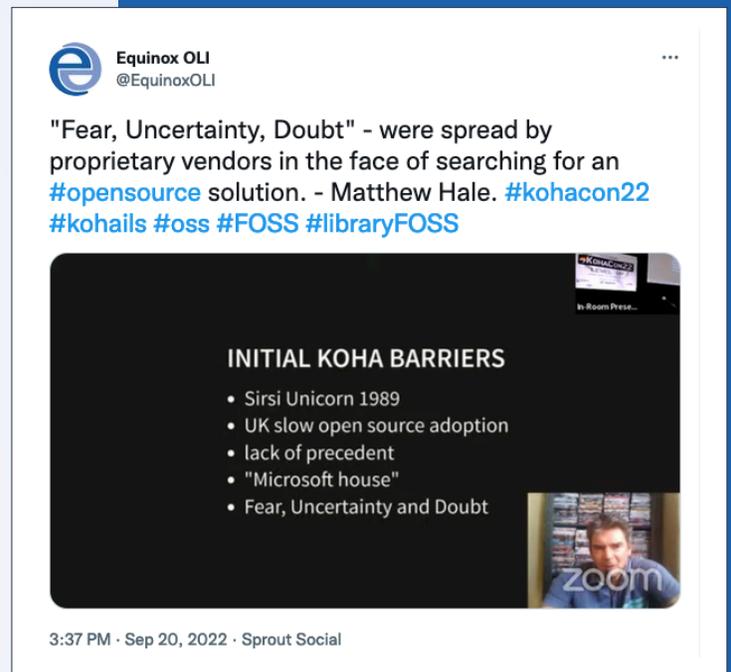
Equinox Tweets @NISOInfo: Open Source & Community Supported Infrastructure.

@evviva: What is the value to your institution? What is the risk if you don't invest? Open is a path & also a stake in the ground, this is a way of saying this is of value to our institution.

@NISOInfo [#NISOInfo](#) [#opensource](#) [#oss](#)

Equinox Tweets @ #evgils22: It Takes a Community to Design an Experience

@veethikaa decision fatigue goes away when we give advice to others. Our brain understands the joy of designing for others. [#evgils22](#)



Education & Outreach

CONFERENCE PRESENTATIONS

2022 Charleston Conference

Why an ERM in a Small Library? Implementing CORAL at William Jessup University.

Presenters: Erica Rohlfis and Michael Kares

Why an ERM in a Small Library? Implementing CORAL at William Jessup University



coralerm

About Us

The Paul Nystrom Library serves a small private university. We are a long time user of open source software for cost effective infrastructure.

Equinox provides innovative open source software for libraries of all types. We have partnered with the Paul Nystrom Library for several years to support Evergreen ILS, and now CORAL.

Why an ERM?

Centralize and Secure Data: Before CORAL, resource data was stored in staff emails, spreadsheets or website notes. Staff turnover = Information loss

Flexible Data Storage: A relational database allowed storage of more, linked, data than possible in emails, spreadsheets, or database lists.

CORAL ERM

Resources Module: Data tracking and workflow tools

Organizations Module: Manage vendor account information

Licensing Module: Store license agreements

Usage Statistics Module: Manual and automated collection of usage statistics

Management Module: Store policies and procedures related to your ERM

Engaging Stakeholders

Unexpected benefits of an **Electronic Resources Management** database:

Easy Reports: Implementing SUSHI gave our director easy access to mid semester stats for major vendors.

New Program Resourcing: Provides a way to manage acquisitions for new programs.

Weathering Reduced Budgets: Centralized cost history allows staff to see how resources have shifted during past enrollment downturns.

Grants Historical Perspective: Demonstrates how the library evolved from a bible college library to a library serving a full university.

Implementation Process

Sequencing Plan:

Define information to be maintained within CORAL.

Data Normalization

Synchronous Data Loading

Takeaways and Challenges



Measure Twice, Import Once: Combine and normalize all data before the initial import. Merging in additional sources posed reloading challenges.

Look Before You Leap: Use CORAL demo sites before filling out templates so you can maximize use of included fields to avoid needless notes.



Holistic Planning: Data mapping and loading must account for the intersections of information between each module.

Outcome Delivery: Understanding what you want to accomplish within CORAL is key to the implementation approach.

Michael Kares | William Jessup University
mkares@jessup.edu

Erica Rohlfis | Equinox Open Library Initiative
erica.rohlfis@equinoxoli.org



Electronic Resources and Libraries

CORAL ERM for Public & Academic Libraries: Low Risk, High Reward

Presenters: Lisa Carlucci, Angela Kilsdonk, John Yorio

Abstract: CORAL offers a “low risk, high reward” option for managing electronic resources. As a mature and stable ERM system used by libraries worldwide, CORAL is customizable for use in public and academic libraries. The Equinox team presents two CORAL initiatives: the 2021 CORAL Online Summit and a project updating JQuery.

[View Slides](#)



American Library Association Annual Conference

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

Presenters: Andrea Buntz Neiman, Rogan Hamby

Abstract: Open source technology and libraries are a natural fit: both thrive on engaged communities, information sharing, and publicly-available resources. With open source software, libraries are active participants in an open software community and benefit from the advantages of lower costs and fewer limitations compared to proprietary software. 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 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.



New England Technical Services Librarians 2022 Annual Spring Conference

Be a Report Warrior & Data Analyst Hero

Presenters: Rogan Hamby and Jennifer Weston

Abstract: Join us to discuss various types of reports and data analysis opportunities available within Technical Services that can provide unique value and benefit to your whole organization. With no special emphasis on specific reporting tools or library systems, we will explore the types of specialized collection assessment and circulation usage reports that staff in Technical Services are uniquely positioned to provide for Collection Development and Analysis.

[View Presentation](#)



2022 Evergreen International Online Conference

Exploring and Using the Evergreen API

Presenter: Galen Charlton

Abstract: No ILS is an island, Evergreen included. Evergreen makes the most of its functionality available via APIs that can be used by other programs, but in order to use those APIs, one has to know what they are and where to find them. Galen Charlton will lead attendees through an exploration of the Evergreen API and will present a tool for getting information about specific APIs. By the end of the preconference, attendees will know the basics of invoking Evergreen's API, have access to a tool for exploring it, and will be on their way to starting a small project to use it.

[View Slides](#)

SQL for Librarians

Presenter: Rogan Hamby

Abstract: In the fourth installment of SQL for Librarians instead of starting with a basic tutorial on SQL we will instead jump straight into the thick of it. I will be soliciting questions and problems in advance from attendees. We will then work through them procedurally to address core questions of data in Evergreen and maybe learn a few fun tricks along the way.

[View Slides](#)

Collecting Ideas: Imagining the Future of Collection Development.

Presenters: Rogan Hamby, Jennifer Weston

Abstract: Join us for a round table to brainstorm and imagine what tools could be developed to assist collection development in Evergreen. Bring your experiences and opinions both to make suggestions and provide feedback on the ideas from others. Proposals developed during the roundtable will be logged as wishlist requests in Launchpad.

[View Slides](#)

Authority Fest

Presenter: Jennifer Weston

Abstract: Authority-Fest will be a two-hour interactive session to provide a basic introduction to how Authorities work in Evergreen currently and to hold a structured group discussion on pros/cons of maintaining authority records. Attendees will work together to share current practices, draft a consolidated list of known issues, and craft suggestions for improved functionality. This event is open to anyone with an interest in Evergreen Authority Records and processes!

[View Slides](#)



2022 Evergreen International Online Conference

Developing & Implementing Curbside Pickup Services

Presenters: Angie Devers (Emmaus Public Library), Katie Greenleaf Martin (PaLLS/SPARK), Angela Kilsdonk.

Abstract: Libraries have been at the forefront of adapting service models to respond to community needs during the COVID-19 pandemic. Learn how the Emmaus Public Library, a member of the PaLLS consortium in Pennsylvania, responded to the evolving needs of patrons and staff during the last 2 years by iterating their curbside pickup workflows and implementing the Evergreen ILS Curbside Pickup module. This panel session will share the lessons and experiences of the Emmaus Public Library. It will also describe how the curbside functionality was developed for Evergreen ILS through a partnership between PaLLS and Equinox Open Library Initiative. With libraries closed due to COVID, the need to automate delivery of curbside services became an essential priority. Learn how this innovative functionality was designed, developed, and deployed in record time, and how it made a difference for libraries.

[View Presentation](#)

Filling in the Gaps: Documentation Review and How You Can Help

Presenters: Gina Monti (Bibliomation, Inc), Andrea Buntz Neiman, Jennifer Pringle (BC Libraries Cooperative)

Abstract: Have you ever gone to the Evergreen official documentation only to find the feature you want to learn about isn't there or the documentation doesn't match what you see in Evergreen? Join us for a comprehensive look at what the Documentation Interest Group is up to and how anyone can help make Evergreen's documentation better whether you have just a few minutes or a couple hours spare. In addition to looking at the documentation review currently underway, this session will also introduce users to GitHub through live demos.

[View Slides](#)

Life, the Universe, and the EVERYTHING Permission

Presenter: Andrea Buntz Neiman

Abstract: A very brief overview of the EVERYTHING permission, what it does, what it doesn't do, and where it might cause you issues.

[View Slides](#)



2022 Evergreen International Online Conference

Open Source—Software and Beyond

Presenters: Elizabeth Davis (PaLLS/SPARK), Angela Kilsdonk, Katie Greenleaf Martin (PaLLS/SPARK), Jennifer Weston

Abstract: Staff from PaLLS (PA's Evergreen consortium) & Equinox Open Library Initiative will discuss a variety of open source projects and products that they use. They will give an overall survey of open-source options for common proprietary software packages, as well as discussing how the open source movement has moved beyond software and into other domains, like cataloging rules and intellectual property. Presenters will also give detailed information on Open Refine for data management and SubjectsPlus for resource guides and websites, both of which can be used in conjunction with Evergreen.

[View Presentation](#)

Going Fine Free

Presenter: Rogan Hamby

Abstract: With a strong movement towards going fine free, many libraries want to go down that path but aren't sure how to do it. Join me for a detailed explanation from the library's stand point of how to plan going fine free and what can be done with Evergreen to make it easier for you.

[View Presentation](#)

Branches on the Evergreen Tree: New Feature Highlights for 3.8 and 3.9

Presenters: Ruth Frasur, Andrea Buntz Neiman

Abstract: Join us for year three of the Ruth & Andrea show as we talk about what's new and exciting in Evergreen 3.8 and 3.9. We promise that there will be at least one unplanned comedic moment and maybe planned ones too. While we won't have time to take a deep dive into everything, we'll hit the highlights of the two most recent releases & answer your new-feature questions.

[View Presentation](#)



Evergreen Documentation Interest Group Meeting

A Very Short Intro to GitHub for DIG

Presenter: Andrea Buntz Neiman

Abstract: A quick introduction to Evergreen's GitHub platform, with a focus on documentation.

[View Slides](#)



2022 CORAL Online Summit

Community Overview and Summit Logistics

Presenter: Jennifer Weston

Abstract: Presentation provides a brief look at the CORAL community, volunteer efforts, and global participation. Preliminary questions are suggested to begin a discussion about the needs of the community for support and documentation.

[View Presentation](#)

Planting a Reef: A Checklist for Getting Started with CORAL

Presenters: Jason Boyer, Rogan Hamby, Erica Rohlfs

Abstract: Lessons learned from a recent CORAL implementation case study with suggestions for successfully planning for an implementation project.

[View Slides](#)

CORAL Vendor Services Panel

Presenters: Andy Panayiotou, Product Manager, SirsiDynix; Angela Kilsdonk, Equinox

Abstract: An introduction to the types of services that support vendors can offer for implementing and optimizing CORAL for electronic resource management in your organization.

equinoxEDU

2022 EQUINOXEDU: YEAR IN REVIEW

Jennifer Weston, Product and Education Specialist

The equinoxEDU program, launched in February of 2021, entered its first full year in 2022 of offering a suite of online educational services for open source library communities. The foundational components of the equinoxEDU program including the free Spotlight webinar series, fee-based educational Workshops, and online Resource Library continued to successfully offer informational opportunities throughout the year. The equinoxEDU team and special guests offered materials in live event formats, video recordings, and static online content to make the resources widely available and accessible.

New equinoxEDU announcements and materials from past events dating back to the beginning of the program are all maintained by the equinoxEDU team in the [equinoxEDU: Events Guide](#), using the open source tool SubjectsPlus, to share with interested members of the open source communities.

One of the many highlights of the equinoxEDU: Spotlight series is always a review of new feature releases. In 2022, the equinoxEDU offerings expanded to provide not only one hour webinars that are recorded and made available online with a look at many of the new features, the team also began creating and sharing new SubjectsPlus guides for the new releases to provide supplemental documentation. The new guides, such as the [Evergreen New Feature Review Guide](#), serve as a reference hub with

links to many valuable resources, downloadable detailed summary grids, individual handouts for the new features, and upgrade checklists.

Additional topics for equinoxEDU events included introductions to a few of the other open source products supported by Equinox Open Library Initiative including Fulfillment interlibrary loan management services and VuFind® discovery services. The new products were added to an already robust course of materials including the recurring equinoxEDU: Workshop sessions on Evergreen reports. In 2023, specific high demand equinoxEDU: Spotlight webinars and Workshop sessions will be offered on a recurring basis to create opportunities for more participation along with standalone events exploring a wider range of open source products and possibilities.

The equinoxEDU team will be exploring the creation of an on-demand curriculum to allow registration to access pre-recorded materials augmented with live discussion sessions. Planning is also continuing for integrated mini-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](#) to receive information about upcoming events.

About equinoxEDU Events:

Join Equinox to expand your open source education! Every month we hold live webinars on a variety of topics related to open source technologies as well as new innovations and standards in libraries, archives, and museums.

equinoxEDU: Spotlight events provide quick educational opportunities for library professionals. These one-hour webinars are held monthly and provide overviews of topics related to open source software in libraries. Spotlight webinars are free and open to all!

equinoxEDU: Workshop events provide an opportunity to gain in depth knowledge about a specific topic without the structure of a full training program. Work with an Equinox Trainer and your fellow equinoxEDU: Workshop attendees to learn a new skill today!

January 2022: equinoxEDU: Spotlight on Fulfillment

Presenters: Andrea Buntz Neiman; Amy Terlaga, Director of Member Services, Bibliomation, Inc.

Abstract: Take ownership of your ILL software! Join us for an introduction to Fulfillment, a fully open source union catalog and resource sharing system. Fulfillment is a modern resource sharing platform that supports the needs of public and academic library consortia, providing intuitive workflows and powerful reporting. This live webinar will provide an overview of the ILL workflow in Fulfillment, as well as a discussion of configuration options. [View Slides](#)

February 2022: equinoxEDU: Spotlight on Evergreen 3.8

Presenter: Jennifer Weston

Abstract: Join us as we highlight some of the newest features in version 3.8 of Evergreen. On-demand materials will be provided in advance for early review, and you will have the opportunity to submit questions to the presenter prior to the live webinar. Topics will include a look at the rewrite of the Acquisitions Administration Interfaces, updates to the Holdings Maintenance & Item Attributes Editor, and Consolidated Patron Notes, Alerts, and Messages. [View Slides](#)

March 2022: equinoxEDU: Spotlight on VuFind® Development

Presenter: Galen Charlton

Abstract: VuFind® is a user-friendly, customizable, open source discovery layer designed to serve as a replacement for the traditional OPAC by providing faster search functionality while searching and browsing all of a library's collection, including print and digital collections. Join us for an introduction to VuFind® and a discussion of recent updates to the connection between VuFind® and the Evergreen ILS! In this live webinar, we will present VuFind® as a front end for the Evergreen ILS and discuss recent updates made to the VuFind® Evergreen ILS Driver by Equinox Open Library Initiative. We'll look at the implications for the VuFind® driver on Evergreen's approach to managing access to sensitive patron information. This session is suitable for anyone interested in learning more about using VuFind® with Evergreen. [View slides](#)

March 2022: equinoxEDU: Workshop on Evergreen Reports (Basic)

Presenter: Jennifer Weston

Abstract: Join us for a live online workshop where we will introduce the basics of working in the Reports module in the Evergreen ILS. We will begin with basic information about how Evergreen works as a database, how information is stored, and what goes into making reports. During the session, we will work together to run, clone, and modify existing templates. Workshops on more advanced reporting will be offered later this year.

April 2022: equinoxEDU: Spotlight on Going Fine Free

Presenter: Rogan Hamby

Abstract: Join us for a discussion on Going Fine Free in your library! In this live webinar, we will present a series of considerations for any library contemplating a move to becoming a fine free library. We will explore what is involved in implementing a systematic shift to becoming fine free – either permanently or on a trial basis. Without focusing on any specific ILS, we will offer suggestions for data review, requirement definitions, roll-out procedures, and the importance of identifying potential exemptions to the application of a new fine free policy.

[View Slides](#)

June 2022: equinoxEDU: Spotlight on VuFind® Updates

Presenter: Angela Kilsdonk

Abstract: Join us for a discussion about recent updates to VuFind®! In this live webinar, we will present an overview of the VuFind® discovery interface. We'll look at enhancements made to VuFind® and how your library can enhance discovery services for your patrons. This session is suitable for anyone interested in learning more about using VuFind®.

[View Slides](#)

August 2022: equinoxEDU: Spotlight on Evergreen 3.9

Presenter: Jennifer Weston

Abstract: Join us as we highlight some of the newest features in version 3.9 of Evergreen. Topics will include a look at the new Simple Reports interface, a new cover image uploader, and customizable options for the staff portal page.

[View Guide](#)

November 2022: equinoxEDU: Spotlight on Open Source Thanksgiving

Presenters: Andrea Buntz Neiman, Jennifer Weston

Abstract: This webinar highlights some of our favorite open source products with discussion about how they serve libraries, including Evergreen, Koha, Fulfillment ILL, SubjectsPlus, CORAL Electronic Resource Management, VuFind Discovery, and Aspen Discovery. Join us as we take a peek at each of these products and celebrate recent accomplishments in each of the open source communities.

[View Slides](#)

Development

2022 Evergreen Development

The Equinox development team is very proud of another year of major contributions to the Evergreen codebase. The keywords for our Evergreen development projects this year are “accessibility” and “angular”—the Angular framework, that is. Seventeen of Equinox’s 30 Evergreen development projects in 2022 were related to one or both of those things. That’s over half of our yearly development!

The Angular framework is used for all of Evergreen’s newer interfaces in the web client, and the community as a whole has been working for many years to upgrade older legacy interfaces to Angular. Last year, we finished ‘Angularizing’ the Purchase Order & Line Items interfaces for Acquisitions, and we’re proud that those are available to the Evergreen community as of the Fall 2022 release 3.10. We continued working with our Acquisitions partner, the Evergreen Community Development Initiative, to write specifications for two of the last three pieces of the Angular Acquisitions project. The Angular Acquisitions project has been ongoing since 2018, and we’re looking forward to delivering the final pieces of that in the very near future!

In 2022, we also completed Angularization on a half-dozen administration interfaces, including Notifications and Action Triggers; Library Settings; and Cash Reports, among others. Working with community partner King County Library System, we spent part of our development time in 2022 writing and delivering specifications for even more Angular interfaces, most notably the main Reports interface. We will be bringing the Evergreen community a rewritten, fully Angularized Reports interface for 2023.

An important but often-overlooked part of web applications is accessibility—which goes hand-in-hand with usability. Interfaces which are more accessible are able to be used by a broader range of users of varying abilities, regardless of how they interact with a website.

Working with King County Library System and the accessibility experts at the Georgia Tech Center for Inclusive Design & Innovation (CIDI), Equinox commissioned an accessibility review of several Evergreen staff catalog interfaces and has been working diligently to produce code to remediate the issues identified in those interfaces. We’ve already submitted a dozen patches to the Evergreen community and have many more queued up. Part of this project will include producing a guide for Evergreen community developers delineating best practices for accessible user interface development.

As we continue to upgrade interfaces to the Angular framework, we will take the lessons learned from CIDI’s investigation and use those to make accessibility improvements in concert with the Angular upgrades. In addition, Equinox front end developer Stephanie Leary has submitted patches directly to the Angular community which will improve accessibility worldwide for all the software using the Angular framework—because Angular, like Evergreen, is open source! Anyone can contribute, and the more contributions, the better the code is for everyone.

Development Projects

Over the past year Equinox has completed thirty projects with 9 partners. Check out a sample of our work on the following page.

Development Projects

Project	Partner(s)
Queued Ingest	KCLS
Did You Mean: Multi word single class Search Suggestions	ECDI
Koha Connector for Fulfillment ILL	n/a
OAI-PMH Data Provider Support	n/a
Localized Notices in Evergreen	LBCC
Angular Notifications/Action Triggers Port	LBCC
LP1846552 (Shelving Location Order Port)	KCLS
Angular Acquisitions Sprint A (Ordering) Specification	ECDI
Angular Reports Interface Specification	KCLS
Angular Link Checker Interface Specification	KCLS
Angular Custom Org Unit Tree Interface Specification	KCLS
Angular Staff Catalog Accessibility Review - Report & Patches	KCLS
LP1857910 (Field Documentation Port)	KCLS
SIP Redaction Consultation (EG SIP)	Pioneer
LP1839341 (Library Settings Port)	KCLS
LP1859701 (Cash Reports Port)	KCLS
Angular Acquisitions Sprint B (Invoice & Claims) Specification	ECDI
SmartPay Integration	Westchester

*Thank You
to our 2022
Development
Partners!*

- » Bibliomation
- » CW MARS
- » Evergreen Community Development Initiative
- » Evergreen Indiana
- » King County Library System
- » Linn-Benton Community College
- » Pennsylvania Integrated Library System
- » Pioneer Library System
- » Westchester Library System

Subcontractor partner:

- » Georgia Tech Center for Inclusive Design & Innovation (CIDI)

Evergreen Community Positions:

Jason Boyer

- » Evergreen Community Developer; Evergreen Core Committer

Galen Charlton

- » Evergreen Project Board, Treasurer; Evergreen Cataloging Interest Group; Evergreen Release Team; Evergreen Community Developer; Evergreen Core Committer

Jason Etheridge

- » Evergreen Release Team; Evergreen Community Developer; Evergreen Core Committer

Rogan Hamby

- » Chair of the Evergreen Outreach Committee; Evergreen Project Board, Member; Evergreen Conference Committee; Evergreen Community Developer

Stephanie Leary

- » Evergreen Community Developer

Andrea Buntz Neiman

- » Evergreen Outreach Committee; Evergreen Cataloging Interest Group; Evergreen Documentation Interest Group; Evergreen Documentation Committer

Erica Rohlfs

- » Evergreen Documentation Contributor; Serials Interest Group Facilitator

Mike Rylander

- » Evergreen Release Team; Evergreen Community Developer; Evergreen Core Committer

Jennifer Weston

- » Chair of the Evergreen Cataloging Interest Group; Evergreen Outreach Committee; Evergreen Conference Committee; Evergreen Documentation Interest Group

Evergreen Release Teams

Evergreen Release 3.9 April 2022

3.9 Release Team

- » Mike Rylander (Equinox)
- » Shula Link (PINES)
- » Jason Etheridge (Equinox)
- » Michele Morgan (NOBLE)

Other EOLI 3.9 Contributors

- » Jason Boyer
- » Steven Callender
- » Galen Charlton
- » Rogan Hamby
- » Angela Kilsdonk
- » Stephanie Leary
- » Andrea Buntz Neiman
- » Erica Rohlfs
- » Jennifer Weston

Evergreen Release 3.10 November 2022

3.10 Release Team

- » Jane Sandberg (independent)
- » Michele Morgan (NOBLE)
- » Terran McCanna (PINES)
- » Galen Charlton (Equinox)

Other EOLI 3.10 Contributors

- » Jason Boyer
- » Jason Etheridge
- » Rogan Hamby
- » Stephanie Leary
- » Andrea Buntz Neiman
- » Erica Rohlfs
- » Mike Rylander
- » Jennifer Weston

2022 Year in Review: Evergreen Conference

Jennifer Weston and Rogan Hamby (Evergreen Conference Planning Committee Members)

Evergreen's annual conference continues to be a strong tradition for the Evergreen community, affording community members the opportunity to join together in a dedicated time and space to review achievements, share insights, ask questions, discuss challenges, brainstorm ideas, identify new opportunities, and build stronger partnerships.

Due to the continuing COVID-19 pandemic and uncertainty surrounding the possibilities of meeting in person, the annual conference was once again an online event. Following the successful pivot to online event planning in both 2020 and 2021, the planning for an online conference in 2022 benefitted from lessons learned from the earlier endeavors. Unlike the previous years, the 2022 online conference did not fall under the banner of the Evergreen Outreach Committee for initial planning. A subset of volunteers from the previous two online events worked together to join a planning committee composed of seven people from five organizations, including Equinox staff. With the support of The Evergreen Project board, the planning committee began meeting in December 2021 to plan for the conference which was held June 13-16, 2022.



The theme of the 2022 Evergreen Online Conference was "Shaping the Future" as the community continues planning for what comes next. Veethika, a Senior Product Designer at GitLab, kicked off the conference as the keynote speaker with a presentation titled "*It Takes a Community to Design an Experience.*"

Equinox was once again pleased to be a champion-level sponsor of the conference which offered 4 pre-conference sessions, 22 main conference presentations, 6 interest group meetings, and an online hackfest following the conference for both development and documentation. A selection of shorter, 30-minute sessions were offered in response to community suggestions to accommodate busy work schedules for people juggling online attendance with other responsibilities. The Cataloging Interest Group hosted its first ever "Authority-Fest" event during the hackfest as a collaborative brainstorming session focusing on a single topic.

Conference attendance remained high as the openness of the online event combined with lower costs and no travel removed barriers for many people wanting to attend. Final numbers reported to the Evergreen Project Board for attendance included 225 regular conference registrations, 65 pre-conference registrations, and 155 hackfest registrations. Strong attendance numbers combined with an increase in the number of sponsors for the online event resulted in a total net revenue of approximately \$30,000 for The Evergreen Project.

While the online format for the conference has been a success, the 2023 conference will be the first held in person since 2019 in Worcester, Massachusetts from April 26-29, 2023. More details about the conference can be found [here](#).



[Koha](#) is a full-featured ILS with a dual-database design (separate search engine and RDBMS) built to be compliant with library standards. Koha supports multiple backend search engines for additional flexibility. The OPAC, staff client, and self-checkout interfaces are all web applications. Distributed under the GNU General Public License (GPL), libraries are free to use and install Koha themselves or to purchase support and development services.

May saw the release of Koha 22.05, bringing new features like two-factor authentication for the staff client and borrower-initiated item recalls. Two-factor authentication is becoming increasingly important to protect the accounts of users able to access and modify patron personal information. Recalls on currently circulating items are a feature that academic institutions using Koha will find of great value for their students and faculty.

Since 2019, Equinox has offered free Koha hosting and support to small libraries in need as part of the Equinox Open Source Grant. In June, we were pleased to welcome the latest recipient, the [Weeksville Heritage Center](#), to free Equinox Open Library Initiative Koha hosting. We look forward to helping them make their resources available to users for years to come!

Highlights

New Koha Libraries in 2022:

- » [Ohio Center for Autism and Low Incidence](#)
- » [Visual Art Library](#)
- » [Lakewood Baptist Church](#)
- » [Weeksville Heritage Center](#)

Events:

[Koha-US](#): Equinox was a corporate sponsor of KohaCon22 in Lawrence, KS



coralerm

[CORAL](#) is an open source electronic resources management system. Its interoperable modules allow libraries to streamline their management of electronic resources. CORAL provides useful tools for both academic and public libraries, including customized acquisitions workflows, license comparison and management, vendor and subscription management, and COUNTER-compliant reporting tools. CORAL is a great addition to your library's open source toolbox to assist staff as they navigate the complexities of electronic resource management.

2022 Year in Review: CORAL

Continuing to maintain an active presence as an Affiliate Member of the CORAL Steering Committee was a priority for Equinox Open Library Initiative in 2022. Staff continued to participate in the community of users and organizations working with the free, open source CORAL electronic resources management (ERM) system to help guide activities and communications while building partnerships with other institutions in the CORAL community.

In May, Equinox once again hosted a CORAL Online Summit as a free event for the CORAL open source community. Registration numbers increased from the previous year along with an expansion in the diversity of summit attendees. Nine countries were represented by people from fifty-six organizations. Community

members delivered [presentations](#) on the various CORAL modules, vendor services, and local utilization case studies. New in 2022, the summit included breakout sessions for group discussion to brainstorm on ideas for future development, training, mentoring, and growing the community. The [2022 CORAL Online Summit recording](#) is available in the equinoxEDU: Resource Library.

In the spring and fall of 2022, Equinox worked with three organizations to implement CORAL by providing data migration services, configuration assistance, and training. All three organizations (William Jessup University, John Brown University, and Columbia Theological Seminary) are now successfully working with their new CORAL systems and praising the benefits of the software to enhance and streamline their electronic resource tracking.

In November, Equinox partnered with one of the new CORAL adopters, William Jessup University, on a poster presentation at the [2022 Charleston Conference](#).

As an ongoing endeavor, Equinox is also contributing time to developing CORAL infrastructure as staff continue to work on jQuery updates and to review known issues for possible resolution. Equinox will continue to work with other development partners to redefine new release procedures for CORAL and to provide related documentation to the community in 2023.

Highlights

Equinox helped three organizations implement CORAL:

- » John Brown University
- » William Jessup University
- » Columbia Theological Seminary

Events

- » [2022 CORAL Summit](#)
- » "[Why an ERM at a Small Library?](#)"—poster presentation by Erica Rohlf and Michael Kares of William Jessup University at the Charleston Conference.



Fulfillment is a fully open source ILL 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.

Overview of the year

In 2022, Equinox made significant progress on two more Connectors for Fulfillment—one in progress for Sierra ILS, and one for Koha ILS. A Connector is a piece of software that communicates between Fulfillment and a member ILS, allowing for enhanced automation related to interlibrary loan requests. Connectors allow Fulfillment to perform real-time availability checks in the ILS as well as place holds and automate circulation, all without staff intervention.

This year also saw another upgrade of Fulfillment's Evergreen baseline. Since Fulfillment is based on the Evergreen code, this upgrade means Fulfillment users now have access to the most recent pieces of Evergreen including security updates as well as new features like Simple Reports.

Events

equinoxEDU: Spotlight on Fulfillment January 26, 2022

*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.

American Library Association Annual Conference, June 2022

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

Presenters: Andrea Buntz Neiman and Rogan Hamby

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.



SubjectsPlus is a user-friendly, open source, content management system. It offers tools for libraries of all types to create subject and research guides, organize curated content, and develop and manage library websites.

Equinox doesn't just support SubjectsPlus, we use it as well. The Evergreen New Feature Review Guide provides information on new features and enhancements in the most recent versions of Evergreen ILS along with relevant community resources. Our Education Team uses SubjectsPlus to highlight equinoxEDU events, disseminate training materials to our staff, and deliver training materials to migrating libraries.

SubjectsPlus Community

SubjectsPlus is backed not only by Equinox, but by a global community of librarians and developers.

- » SubjectsPlus Community Website: <https://www.subjectsplus.com>
- » SubjectsPlus Wiki: https://subjectsplus.com/wiki3/index.php?title=Main_Page
- » SubjectsPlus Forum: <https://groups.google.com/forum/#!forum/subjectsplus>
- » SubjectsPlus Source Code: <https://github.com/subjectsplus/SubjectsPlus>



VuFind® is an open source library discovery interface that allows libraries to replace their traditional OPACs with a system that provides access to all library resources, including catalog records, local journals, digital library items, and institutional repositories.

Overview of the Year

During 2022, Equinox completed a production implementation of VuFind® for a community college and devised a new user interface theme currently being trialed by our customers. Equinox is also wrapping up work on significant improvements to the VuFind® ILS driver for Evergreen.

Equinox became the first VuFind® Registered Service Provider in the United States in 2022.

Highlights

- » 2022 marks when Equinox launched our first production implementation of VuFind®.

Events

- » March 2022: Equinox announced support for VuFind®.
- » March 2022: Spotlight on VuFind®
- » July 2022: First production customer live on VuFind®.
- » [October 2022: Equinox became a Registered Service Provider for VuFind®.](#)



**Aspen
Discovery**

[Aspen Discovery](#) is a fully-featured, open source discovery system, which provides comprehensive access to your library's resources. It gives patrons a single search box and smart search results that group all formats of a title together, allowing the patron to easily get access to their preferred version.

Aspen Discovery integrates with your ILS and with a wide range of eContent providers including Library Market, OverDrive, Hoopla, and cloudLibrary. It also can pull in enriched content from a variety of sources such as Novelist and Syndetics. [Learn more about Aspen Discovery.](#)

Overview of the Year

2022 marks Equinox's entrance into offering services for Aspen Discovery.

Highlights

- » Three pull requests by Equinox staff members were accepted into Aspen Discovery, marking the beginning of our development contributions to Aspen Discovery. Equinox staff have also provided significant assistance towards the creation of the Evergreen ILS driver for Aspen Discovery.
- » Equinox has signed agreements with several libraries to implement Aspen Discovery, with go-lives expected by early 2023.

Events

- » [July 2022: Equinox announces support for Aspen Discovery.](#)

Equinox Gives

EQUINOX OPEN SOURCE GRANT

The Equinox Open Source Grant provides implementation, training, hosting, and support services for Koha ILS, an open source integrated library system used by libraries worldwide. The grant is provided for an initial term of three years and can be renewed indefinitely as long as the recipient continues to qualify for the grant.

The Equinox Open Source Grant first launched 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. For more information about the grant, please visit the [Equinox Open Source Grant resource page](#).

Equinox Open Source Grant was featured in the [International Coalition of Library Consortia Strategies for Collaboration Report](#)

Grants were identified as a potential way to kickstart alternative solutions for libraries and Equinox's Open Source Grant was given as an example as one option open to pioneering such solutions for libraries. [Read the full report](#).

WEEKSVILLE HERITAGE CENTER

[Weeksville Heritage Center](#) is a historic site and cultural center in Brooklyn, New York dedicated to preserving the history of Weeksville, one of the largest free Black communities in pre-Civil War America, and the Historic Hunterfly Road Houses. Their 5th of July Resource Center provides access to their collections, archives and oral histories to students, teachers, scholars and the general public. They went live on Koha ILS in September 2022 as part of the 2022 Equinox Open Source Grant.



Resources

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- Weston, Jennifer. "Community Overview & Summit Logistics." 2022 CORAL Online Summit, 18 May 2022, Online. Presentation.
- Weston, Jennifer. "Introduction to Authorities in Evergreen." Authority-Fest, 17 June 2022, Online. Presentation.
- Weston, Jennifer and Rogan Hamby. "Technical Services: Be a Report Warrior & Data Analysis Hero." New England Technical Services Librarians Conference, 8 April 2022, Online. Presentation. <https://youtu.be/aMLWHMz2CZo>.

Equinox *Implements*

3

VuFind® /
SubjectsPlus /
Aspen Discovery
migrations

3

CORAL migrations

4

Koha migrations

8

Evergreen migrations

17

Total number
of migration
projects

7

Number of library
systems going live

Total number
of bibliographic
records migrated

508,009

Total number of
patron records
migrated

130,486

Key Statistics

25

Evergreen library branches going live

4

Koha library branches going live

37

Total library branches going live

Number of consortial add-on projects

6

Number of distinct source legacy ILSs

8

Number of standalone migrations

5

Policy Consultations

2

Data Services Projects

12



What is F/OSS, anyway?

Freeware

- Software classified as freeware may be used without payment and is typically either fully functional for an unlimited time or has limited functionality, with a more capable version available commercially or as shareware. ([wikipedia](#))

"Free as in kittens"

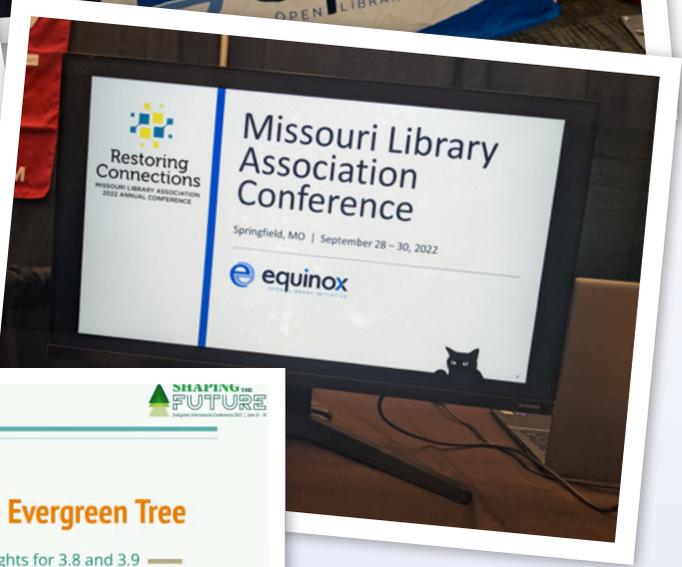
- "Free software" means software that respects users' freedom and community. Roughly, it means that **the users have the freedom to run, copy, distribute, study, change and improve the software**. Thus, "free software" is a matter of liberty, not price. To understand the concept, you should think of "free" as in "free speech," not as in "free beer." We sometimes call it "libre software," borrowing the French or Spanish word for "free" as in freedom, to show we do not mean the software is gratis. ([GNU](#))

Open Source

- "Open source" is something different: it has a very different philosophy based on different values. Its practical definition is different too, but nearly all open source programs are in fact free. ([GNU](#))
- Open source doesn't just mean access to the source code. The distribution terms of open-source software must comply with the following criteria . . . ([OSI](#)) [the first criterion is Free Redistribution]

FOSS
Freeware

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SHAPING the FUTURE
Equinox Open Library Initiative

Branches on the Evergreen Tree

— New Feature Highlights for 3.8 and 3.9 —

Andrea Buntz Neiman
Equinox Open Library Initiative

Ruth Frasar
Indiana State Library

