equinox
OPEN LIBRARY INITIATIVE

2024 *Year in Review*

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

2024 *Highlights*

January

Conferences
- » Equinox at ALA LibLearnX 2024

Evergreen
- » Equinox Welcomes Morgan County Library to Evergreen ILS with the Missouri Evergreen Consortium

February

Evergreen
- » Pennsylvania Integrated Library System Selects Equinox as Evergreen ILS Support Provider

"We enjoy working with Equinox staff to collaborate with us in creating solutions for our libraries."
—Katie Greenleaf Martin, PaILS

March

Conferences
- » Equinox Open Library Initiative Sponsors AspenCon 2024
- » Equinox at the Public Library Association 2024 Conference

Partnership
- » Equinox Open Library Initiative Partners with OCLC to Provide Access to the WorldCat Metadata API for Mutual Customers

April

Partnerships
- » Equinox Announces Digital Resource Partnership With Connecticut Library Consortium
- » Equinox Partners with Unique Management Services to Provide MessageBee SMS

Conferences
- » Equinox Sponsors the Evergreen International Online Conference 2024
- » Equinox Presents on Aspen Discovery and Open Source Tools at the Connecticut Library Association 2024 Annual Conference

Aspen Discovery
- » Equinox Welcomes Lake Agassiz Regional Library to Aspen Discovery
- » Equinox Welcomes the Evergreen Indiana Library Consortium to Aspen Discovery

Evergreen
- » Equinox's Andrea Buntz Neiman, Project Manager for Software Development, Elected to The Evergreen Project Board
- » Equinox Welcomes Berks County Public Libraries to Evergreen ILS with the Pennsylvania Integrated Library System

May

Development
- » Equinox Announces 2024 Q1 Open Source Project Contributions Including CORAL ERM, Evergreen ILS, and Fulfillment ILL

Conferences
- » Equinox Presents on Aspen Discovery and VuFind® at the New Jersey Library Association 2024 Annual Conference

Aspen Discovery
- » Equinox Welcomes Richland Public Library to Aspen Discovery

Evergreen
- » Equinox Welcomes Morrisson Reeves Library to the Evergreen Indiana Library Consortium
- » Equinox Welcomes Adair County Public Library to Evergreen with the Missouri Evergreen Consortium

"The Equinox team made everything run smoothly."

—Courtney Brown, Evergreen Indiana Library Consortium

June

Development
» Equinox Announces Major Features in Evergreen 3.13
» Equinox Announces Q2 Open Source Project Contributions for Evergreen ILS

Conferences
» Equinox Presents on Resource Sharing and Open Source Development at the 2024 American Library Association Annual Conference

Grants
» Equinox Open Source Grant Renewed for the Center for Khmer Studies

Evergreen
» Equinox Welcomes West Plains Public Library to Evergreen with the Missouri Evergreen Consortium
» Equinox Welcomes Mary S. Biesecker Public Library to Evergreen ILS with the Pennsylvania Integrated Library System

July

Conferences
» Equinox Presents at the 2024 Koha-US Annual Conference

MessageBee
» Equinox Welcomes Kenton County Public Library to MessageBee SMS with Unique Management

August

Consulting
» Equinox Partners With EveryLibrary to Provide Instructional Design and Educational Resources for Library Advocacy

September

Conferences
» Equinox at the Pennsylvania Library Association 2024 Conference

Consulting
» Equinox Welcomes Owensville Carnegie Public Library to the Evergreen Indiana Library Consortium

Evergreen
» Equinox Welcomes Sarcoxie Public Library to Evergreen with the Missouri Evergreen Consortium

October

Development
» Equinox Announces Q3 Evergreen Project Contributions
» Equinox Announces Major Features in Evergreen 3.14

MessageBee
» Equinox Partners with Unique Management Services to Launch MessageBee SMS for the Traverse des Sioux Library System

November

Development
» Equinox Announces New Release of CORAL ERM (2024.10)

Conferences
» Equinox at the Connecticut Library Consortium Vendor Expo 2024

MessageBee
» Equinox Partners with Unique Management Services to Launch MessageBee SMS for Branch District Library
» Equinox Partners with Unique Management Services to Launch MessageBee SMS for the OWWL Library System
» Equinox Partners with Unique Management Services to Launch MessageBee SMS for the Pennsylvania Integrated Library System

Aspen Discovery
» Equinox Welcomes Southeastern Libraries Cooperating to Evergreen ILS and Aspen Discovery
» Equinox Welcomes the Municipal Library Consortium of St. Louis County to Evergreen ILS, Aspen Discovery, and MessageBee with the Missouri Evergreen Consortium

December

Evergreen
» Equinox Welcomes the Union of British Columbia Indian Chiefs to Sequoia Hosting for Evergreen ILS

MessageBee
» Equinox Partners with Unique Management Services to Launch MessageBee SMS for the Missouri Evergreen Consortium

Aspen Discovery
» Equinox Designs Children's Theme for Aspen Discovery for Central Skagit Library District

Open Source *Grant*

The Equinox Open Source Grant was established by Equinox in 2019 to provide access to a modern library management system to non-profit and governmental organizations that possess a library or resource collection, but not the financial or technological resources to host or contract for commercial services. Services under the grant included implementation, training, and three years of hosting and technical support for Koha ILS. Grant services could be extended beyond three years for organizations with an ongoing financial need.

Equinox conducted two rounds of grant awards in 2019 and 2020. Preference was given to libraries serving underrepresented and marginalized communities. In the second round, we also gave special consideration to libraries that had suffered losses because of Covid-19.

Grantees included:

» Biblioteca Nacional de Puerto Rico (San Juan, Puerto Rico)

» Spark Central (Spokane, WA)

» Vermont Jazz Center (Brattleboro, VT)

» Center for Khmer Studies (New York, NY)

» Weeksville Heritage Center (Brooklyn, NY)

2024 marked the end of the initial three-year term for four of the five grantees. Equinox sought updated financials and requested a narrative detailing the impact of the grant on library services and operations. All of the libraries used the opportunity to improve access to their collections and engage in new or revitalized community outreach programs.

Biblioteca Nacional de Puerto Rico started providing remote access to parts of their collection and is now working to create the first Digital Library of Puerto Rico, housing content from five of the most important libraries in Puerto Rico, including the National Library, the Library of the Supreme Court of Puerto Rico, the Library of the Ateneo Puertorriqueno, the Puerto Rican Collection of the Library of the Medical Sciences Campus of the University of Puerto Rico, the Puerto Rican Newspaper Library, and collections from the University of Puerto Rico in Rio Piedras.

Spark Central used Koha Reports to determine whether they were succeeding in a strategic outreach goal to Spokane's historically underserved West Central neighborhood. They flagged West Central residents with a special custom field in the patron record and learned that 24% of the children served through their youth programs and 58% of participants in the Level Up after school program came from West Central. They had not been able to easily generate that data prior to using Koha.

Vermont Jazz Center hired interns from the State of Vermont's Vocational Rehabilitation Program to assist with the cataloging of their collection, providing students with career training and exposure to cultural and educational resources. Koha has allowed them to document their collection and provide a discovery platform for their new archive portal. They are also collaborating to include content from Worcester Polytechnic's Jazz History Database and Columbia College's Center for Black Music Research.

The Center for Khmer Studies has seen increases in the use of their collection, visitors to their library in Siem Reap, Cambodia, and increased interest by young readers. They hosted their first ever book fair, attracting more than 5,000 attendees. They also conducted training on library capacity building, including the fundamentals of library management and cataloging to librarians at the National Museum of Cambodia, the Tuol Sleng Genocide Museum, and the Preah Norodom Sihanouk-Angkor Museum.

The impact of the Equinox Open Source Grant is even greater than anticipated. Equinox plans to provide a new round of grants in 2025 to continue this important work.

Highlights:

» Equinox Open Source Grant Renewed for the Center for Khmer Studies
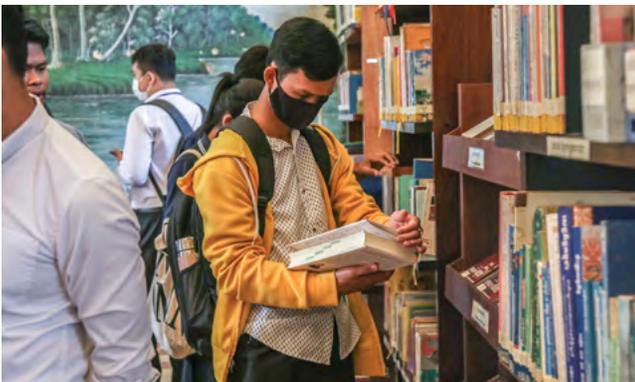
Accessibility

Since 2022, 75% of all Evergreen accessibility bugs ever reported have been fixed. This represents a significant accessibility improvement year over year as Equinox prioritizes accessibility in the development work it contributes to our open source communities.

In Evergreen 3.13 we rebuilt the data tables from scratch to include automatic column sizing and text wrapping (no more cut off barcodes!) and an innovative, keyboard-accessible resize feature. Equinox also helped to introduce a new MARC editor, Reports module, and an updated patron search interface that have been redesigned with accessibility in mind, sponsored by the King County Library System.

As part of Equinox's ongoing commitment to accessibility, and in partnership with BC Libraries Cooperative (BCLC), Equinox's Evergreen 3.14 development included significant work on the OPAC, fixing 60 accessibility issues identified by Canada's National Network for Equitable Library Service. We introduced semantic markup, improved the clarity of form labels and buttons, and revised interactive controls to make the public catalog easier to navigate for those utilizing screen readers and other assistive devices. This represents a significant enhancement to both the usability and overall accessibility of the catalog. This release also included sought-after improvements to the staff interface, including longer-lasting toast notifications, keyboard shortcut hints in the navigation menus, and a dark mode switch.

In addition to our extensive work on Evergreen code improvements, we have also been incorporating accessibility into our work in our equinoxEDU: Spotlights, community documentation, conference presentations, and work with our clients.

» Looking forward into 2025, the CORAL community is reviewing a full accessibility rewrite that is anticipated to be released next year.

» Many of the accessibility improvements we made in our 2023 VuFind® theme have been incorporated into the latest VuFind® default theme.

» We reviewed the Koha staff interface for accessibility and presented our findings at Koha-US in August. We look forward to working with the community to address the accessibility issues and make the Koha interface more user friendly for everyone.

We will continue to work with our community partners to meet statutory requirements and deadlines in the US, EU, and Canada for accessibility compliance.

Equinox's 2024 Accessibility Resources

» Accessibility Guidelines for Evergreen Developers
» Evergreen UI Checklist for Accessibility
» Creating Accessible Evergreen Documentation

Highlights

» 2024 Evergreen International Conference Presentation: "Tip of the Iceberg: Uncovering Accessibility Issues through UI Testing."
» AspenCon 2024 Presentation: "Building Documentation for Aspen: Implementation and Beyond."
» Koha-US 2024 Conference Presentation: "Let's Talk About Koha Accessibility for Library Staff."
» equinoxEDU: Spotlight on Creating Accessible Themes in Aspen Discovery
» equinoxEDU: Spotlight on CORAL User Interface and Accessibility Updates
» equinoxEDU: Spotlight on Libraries and the Need for Accessibility in Open Source Software
» equinoxEDU: Spotlight on Using Aspen Discovery's Web Builder for Your Library's Website

Collaboration

OCLC

» Equinox and OCLC, the worldwide leader in library cataloging and metadata services, partnered this year to offer access to the WorldCat Metadata API for OCLC cataloging libraries using service platforms supported by Equinox. The integration is available to mutual customers. Learn more.

MessageBee

» Equinox partnered with Unique Management Services to provide MessageBee SMS to libraries. MessageBee's design streamlines communication workflows for libraries and maintains the library's brand. Learn more.

» Libraries Utilizing MessageBee with Unique Management Services and Equinox:

- Kenton County Public Library
- Traverse des Sioux Library System
- OWWL Library System
- Pennsylvania Integrated Library System
- Branch District Library
- Missouri Evergreen Consortium

Connecticut Library Consortium

» Multi-year partnership provides special pricing for Aspen Discovery, CORAL ERM, and SubjectsPlus to CLC member libraries. Learn more.

Thank You to our 2024 Development Partners!

» BC Libraries Cooperative

» Bibliomation Inc.

» Columbia Theological Seminary

» CW MARS

» Evergreen Community Development Initiative

» King County Library System

» PaILS / SPARK

» Traverse des Sioux Library System

Education *& Outreach*

Conference Presentations 2024

AspenCon2024

"Building Documentation for Aspen: Implementation and Beyond."

Presenters: Galen Charlton and Lena Hernandez.

Abstract: Aspen Discovery is an incredibly customizable system; its wealth of configuration choices means that each instance may look and act very differently than each other – and nobody uses everything Aspen Discovery offers! Aspen Discovery, as a software and a community, is rapidly growing, and new libraries may have documentation needs that are not yet met. Each library also has local circumstances that make it critical to adapt or write documentation that best suits the needs of the library's particular staff and patrons. This session will focus on how a library using Aspen can build on a shared knowledge base to create documentation that is polished, accessible, and that fits the needs of your own users.

Connecticut Library Association Conference 2024

"Aspen Discovery, CORAL ERM, SubjectsPlus: Unlocking Collections With Open Source."

Presenter: Andrea Buntz Neiman

Abstract: Aspen Discovery, CORAL ERM, and SubjectsPlus are open source products designed to expand the reach of library resources and streamline library workflows. Interested in a discovery layer? Need an easy-to-maintain web portal? Want to better manage your electronic content? Open source has got your back! Learn more from Equinox Open Library Initiative, a trusted nonprofit & CLC vendor.

2024 Evergreen International Conference

"Bins and Bags and Boxes: Resource Sharing Infrastructure and its Challenges."

Presenter: Galen Charlton

Abstract: Join representatives from large consortia to discuss how library items move from location to location, and the implications of that infrastructure for Evergreen use. Galen Charlton will discuss new avenues of development in Evergreen to help the software better prioritize hold transits based on distance, time and costs.
 » Watch

"Using Aspen as Your Evergreen OPAC."

Presenters: Rogan Hamby and Ruth Frasur Davis.

Abstract: Join Rogan and Ruth to discuss the pros, cons, challenges and delights of using Aspen Discovery as an alternative discovery experience for library users. We will look at Evergreen specific considerations when implementing Aspen Discovery, share experiences from a large consortium implementation and collect feedback for the larger Aspen Discovery community. Bring your questions, ideas, and wish lists!
 » Watch

"Tip of the Iceberg: Uncovering Accessibility Issues through UI Testing."

Presenters: Lena Hernandez, Stephanie Leary, and Jennifer Pringle (BC Libraries Cooperative)

Abstract: What looks like a small bug in the Evergreen user interface can actually be a larger issue underneath! Learn how little UI glitches can be clues to hidden accessibility problems that have big consequences. Bad alignment, weird colors, and unexpected pointer styles–no bug is too small to report. We'll describe what to look for and discuss how these little details can add up to big problems for people with visual, mobility, or cognitive impairments. We'll also demonstrate how to find these issues proactively with some five-minute accessibility tests that you can do using only your keyboard and a browser extension or two.
 » Watch

"New Features in Evergreen 3.11+: The Ruth and Andrea Show Version 5.0."

Presenters: Andrea Buntz Neiman and Ruth Frasur Davis.

Abstract: Come hear about all the latest and greatest with your favorite guides to the world of Evergreen, Andrea and Ruth, in their 5th annual rundown of new features. We will talk about what went into Evergreen for 3.11 and 3.12 in 2023, as well as what's potentially coming in 2024 (which may also be the year for Evergreen 4.0!) We promise there will be lots of exciting screenshots and probably a few bad jokes.
 » Watch

New Jersey Library Association Annual Conference 2024

"Library Discovery Layers: Peeling Away the Mystery."

Presenter: Andrea Buntz Neiman et al.

Abstract: What exactly is a Library Discovery Layer? Are they more like onions or a parfait? With the ever-expanding need of libraries for digital access, interconnectivity, and engagement, we'll discuss how they can leverage this technology and what it offers beyond the traditional library catalog. We will also delve into the challenges of moving away from bib level thinking (FRBRization anyone?) and how the Main Library Alliance has managed their discovery platform over the last two years.

American Library Association Annual Conference 2024

"Optimizing Resource Sharing: Evidence Based Approaches for Improving the Efficiency of Borrowing Networks."

Presenter: Galen Charlton

Abstract: Even in 2024, the efficient and effective sharing of physical materials remains a core part of service for many libraries. Libraries have banded together in resource-sharing consortia and networks in order to share materials and better serve their patrons, but sharing materials at scale presents a complicated optimization problem where libraries must balance factors such as cost, transit times, decisions about shared collection development, and responsiveness to patron requests. This program will supplement existing efforts to solve this problem with fresh insight based on the systematic analysis of years of resource-sharing data from several large library consortia.

"From User Group to Community: Software for Libraries, by Libraries."

Presenters: Galen Charlton et al.

Abstract: Is your vendor's user group process slowing you down? Do your enhancement requests languish because they don't gain traction with other members of the user group? Have you ever wondered if there was a way for your core software to be more flexible and responsive to the needs of staff and patrons? In this session, members of the open-source Evergreen community will share examples of how they were able to improve staff workflows and the library user experience with software enhancements realized through the open-source software community. These libraries are no longer limited by a voting process in order to create desired improvements in the software. Instead, the open-source model empowers them to make and share software improvements that will provide the most benefit to their communities.

2024 Koha-US Annual Conference

"Let's talk about Koha Accessibility for Library Staff!"

Presenters: Stephanie Leary and Jennifer Weston.

Abstract: This presentation will outline critical accessibility considerations for the staff interface with suggestions such as optimizing HTML, CSS, and JavaScript in Koha tools and preferences to improve accessibility. Presentation materials will include a checklist of accessibility considerations and a handout with tips for implementation of customizable options available for the staff interface.

Equinox*EDU*

This was equinoxEDU's third year of offering online educational services for library communities. With a strong emphasis on the EDU: Spotlight series in 2024, the equinoxEDU team continued to regularly provide free educational opportunities and resources via live webinars, video recordings, and supplemental digital materials to highlight the many open source products supported by Equinox. Recordings and materials from recent equinoxEDU events and archives from previous years are made widely available in the equinoxEDU: Events Guide, using the open source platform SubjectsPlus. Topics found in the archive include educational materials for Evergreen, Koha, Fulfillment, CORAL ERM, SubjectsPlus, VuFind® and Aspen Discovery.

EquinoxEDU programs in 2024 continued to highlight new feature releases for both the Evergreen and Koha ILS communities in live webinar settings to demonstrate new functionality, discuss upgrade considerations, and answer questions in real time. In addition to ILS features, the equinoxEDU team also incorporated content to emphasize the many possibilities of Aspen Discovery available to libraries who are currently using or considering implementing this discovery layer with their current ILS. In EDU: Spotlight sessions, the team offered creative inspiration for the use of themes in Aspen Discovery and examples of how to use the Aspen Discovery Web Builder to create and maintain a library website.

In addition, the EDU: Spotlight series offered multiple presentations on the theme of accessibility in open source software to provide a general introduction to the definition of accessibility in a modern context, identify tools available for evaluating accessibility, and lead discussions on how communities can work together on implementing best practices. The emphasis on accessibility as a theme in 2024 underscored the work that

Equinox developers contributed to open source communities this year. Included in the spotlight collection featuring accessibility topics was a Spotlight on CORAL ERM Accessibility Updates, which offered a review of the current release of CORAL ERM and proposals for accessibility improvements.

The equinoxEDU team continues to explore ways to provide online resources in the form of training material portals and other on-demand curriculum for the open source communities we work in and the libraries we champion.

Events

February 2024: equinoxEDU: Spotlight on New Features in Evergreen 3.12
Presenter: Andrea Buntz Neiman, Project Manager for Software Development

Abstract: Evergreen 3.12 made its debut in December 2023, and includes new features like a new added content tab in the staff catalog and several upgraded interfaces. Version 3.12 was also important in terms of community process, as it involved many newer committers and release team members. Equinox is proud to have grown the community and even prouder these people were willing to leap into the build process!

March 2024: equinoxEDU: Spotlight on Creating Accessible Themes in Aspen Discovery
Presenter: Lena Hernandez, Product and Education Specialist

Abstract: Whether your library is setting up Aspen Discovery for the first time, or you are interested in learning more about creating high contrast or dark mode theme options, this session is for you. We'll be digging into how Aspen Discovery Themes can be customized to make your library's catalog a better place for your staff and patrons.

May 2024: equinoxEDU: Spotlight on the New Angular Interface for Evergreen Reports

Presenter: Lena Hernandez, Product and Education Specialist

Abstract: We will touch on user experience improvements in navigation and functionality, such as the ability to sort and filter on template search results and viewing all report definitions tied to a single template. We will also take a look at some changes in the implementation of more advanced features such as nullability. This spotlight is for both new and experienced users.

June 2024: equinoxEDU: Spotlight on CORAL User Interface and Accessibility Updates

Presenter: Stepanie Leary, Front End Developer

Abstract: CORAL ERM, an open source electronic resources management system, has been undergoing an intensive period of development work. In addition to the first major release since the beginning of the COVID pandemic, a second release is forthcoming with a new look. Much of this work has focused on modernizing the underlying infrastructure to create big improvements to the UI and overall accessibility of the software.

July 2024: equinoxEDU: Spotlight on Recent Koha Highlights and Features (Koha 23.11)

Presenter: Jennifer Weston, Product and Education Manager

Abstract: Koha is an open source ILS with a very active community. The last two major releases had a combined total of 19 new features, 569 enhancements, and 1,102 bugfixes! With all these new features, improvements, and patches, it can be hard to keep up with the latest Koha news. We'll help you understand some of the biggest changes so you can continue to get the most out of your ILS. All levels of Koha experience are welcome.

August 2024: equinoxEDU: Spotlight on Tips and Tools for Evergreen: Making Your Daily Work Easier

Presenters: Jennifer Weston, Product and Education Manager, and Lena Hernandez, Product and Education Specialist

Abstract: Evergreen ILS is full of a variety of useful features and tools. In the busy world of daily library work, it can be hard to find time to explore and test all the things the system can do. We will be talking about tips for all staff and tools for catalogers and administrators.

October 2024: equinoxEDU: Spotlight on Libraries and the Need for Accessibility in Open Source

Presenters: Stephanie Leary, Front End Developer and Lena Hernandez, Product and Education Specialist

Abstract: The Spotlight will touch on accessibility work happening in several projects including Evergreen, VuFind®, and CORAL ERM. We will talk about how recent and upcoming work on these projects will help libraries conform to the standards set for state and local governments in the recently signed Department of Justice rule on web and mobile app accessibility. For more on the newly signed rule, check out the web rule fact sheet by visiting the ADA.gov website at https://www.ada.gov/resources/2024-03-08-web-rule.

November 2024: equinoxEDU: Spotlight on Using Aspen Discovery's Web Builder for Your Library's Website

Presenter: Lena Hernandez, Product and Education Specialist

Abstract: This session highlights ways to create a seamless experience for patrons, including Web Builder pages and system settings. Whether your current library website is complex or non-existent, we'll have some tips on how you can maximize what Aspen Discovery is doing for your library. This spotlight is for both new and experienced users of the Aspen Discovery Web Builder module.

Development

Security, Accessibility, Usability: 2024 Equinox Development Highlights

Equinox continues to provide leadership for Evergreen ILS development, and this year, Equinox has also made significant contributions to CORAL ERM. Equinox's skilled developers completed several major improvements for both projects in 2024 which were either released in the fall of 2024 or are pending release in 2025.

The themes of the 2024 development work centered around security, accessibility, and usability. In the first half of the year, the team completed a major rewrite of the Resources module of CORAL ERM. The new interface improves accessibility and usability and is fully mobile-responsive. The new interfaces are under review by the CORAL community and will be available in 2025.

For Evergreen ILS, Equinox provided two major security improvements: Multi Factor Authentication, and a new set of RESTful API endpoints. Both projects were funded by the Evergreen Community Development Initiative. Multi Factor Authentication (MFA) is a key part of modern security infrastructure and an implementation in Evergreen has been a long-desired community feature. MFA is now available for Evergreen staff client logins, and administrators can enable and configure one or several secondary factors for verification. Secondary factors can include an SMS or email message with a temporary one-time password or the use of one-time password applications such as Google Authenticator or external devices like YubiKey.

RESTful API endpoints are security features at their core. This kind of controllable API access is critical to ensuring that third-party services can only access the information they need for their application. Evergreen's RESTful API infrastructure gives administrators local control and a wide variety of configurable endpoints to use. The new work includes endpoints for patron information, circulation information, bibliographic and item information, course reserves information, and a special set of endpoints to facilitate integration with discovery layers like Aspen Discovery or VuFind®.

Long-time Evergreen users are familiar with the Buckets interfaces. Buckets are containers of records, patrons, or items. Equinox was thrilled to partner with the Evergreen Community Development initiative to provide a full rewrite of Evergreen's Record Buckets interfaces. This is available in the fall Evergreen 3.14 release, and we hope to work on patron and item buckets next year.

Equinox proudly partners with open source community members focused on improving the accessibility of user interfaces. In 2024, in partnership with the BC Libraries Cooperative, Equinox completed updates to Evergreen's public catalog (OPAC). The changes include updated page headings, table structures, and labels. These standardized elements will improve navigation with screen readers and other accessibility tools, and improve usability for all.

"Equinox is proud to work with its community partners to bring modernization and new features to the entire Evergreen community."

—Andrea Buntz Neiman, Project Manager for Software Development

Development Projects

Project	Partner(s)
CORAL ERM—Release work & bugfixes	Equinox Open Library Initiative
CORAL ERM—Accessibility rewrite	Equinox Open Library Initiative
X12 for ASN Phase II	King County Library System
MFA for Evergreen Phase II	Evergreen Community Development Initiative
Angular Buckets Phase II	Evergreen Community Development Initiative
CORAL ERM—Release work & bugfixes	Equinox Open Library Initiative
RESTful API Part 1 Phase II	Evergreen Community Development Initiative

Consultation Projects

Project	Partner(s)
Editable Item Alerts	CW MARS
Did You Mean 4/5 Phase I	Evergreen Community Development Initiative
RESTful API Spec Revisions	Evergreen Community Development Initiative
Hide request ILL buttons (Fulfillment)	Bibliomation
Force checkin (Fulfillment)	Bibliomation
Self Registration Bugfix	Traverse des Sioux Library System
Angular Circulation Updates	King County Library System
Alerts & Notes in Templates Phase I	CW MARS
Holds Expiration Notice (Koha)	Columbia Theological Seminary
Staff Client Dark Mode	King County Library System
OPAC Accessibility Fixes	BC Libraries Cooperative
Lassos & Policies Phase I	Pennsylvania Integrated Library System
EG-Quipu Integration	Pennsylvania Integrated Library System

Committed to Evergreen: Equinox's 2024 Contributions to Evergreen Code & Documentation

One of the ways to count open source contributions is by counting the changes to the codebase. The Evergreen Community maintains a codebase that includes both the source code for the software itself, as well as the code and files needed to generate the community's documentation website.

Each change to this codebase is called a "commit." A commit can be tiny, huge, or anywhere in between. It may change a single file or dozens of files. It may add or delete files. The point at which a commit is saved as a new or updated piece of the codebase can be considered the moment it becomes a part of Evergreen, officially.

Each commit has an "author" who is the person who's written the change(s) in the commit. Equinox staff have authored thousands of commits to Evergreen over the years, and year after year, Equinox staff are among the community's top authors of new code and documentation.

Through September 30, 2024, eight Equinox authors: Jason Boyer, Galen Charlton, Jason Etheridge, Rogan Hamby, Lena Hernandez, Stephanie Leary, Andrea Buntz Neiman, and Mike Rylander, have contributed 43.2% of all year-to-date commits in Evergreen.

Highlights

» Equinox's Andrea Buntz Neiman Elected to The Evergreen Project Board
» Major Features in Evergreen 3.13
» Q2 Open Source Project Contributions for Evergreen ILS
» Q3 Evergreen Project Contributions
» Major Features in Evergreen 3.14
» Southeastern Libraries Cooperating Selects Evergreen ILS and Aspen Discovery
» Morrisson Reeves Library Joins the Evergreen Indiana Library Consortium with Equinox Consulting Services
» Union of British Columbia Indian Chiefs Selects Sequoia Hosting for Evergreen ILS
» **Pennsylvania Integrated Library System:**
  • Pennsylvania Integrated Library System Selects Equinox as Evergreen ILS Service Provider
  • Berks County Public Libraries Joins the Pennsylvania Integrated Library System
  • Mary S. Biesecker Public Library Joins the Pennsylvania Integrated Library System
» **Missouri Evergreen Consortium:**
  • Municipal Library Consortium of St. Louis County Joins the Missouri Evergreen Consortium
  • Morgan County Library Joins the Missouri Evergreen Consortium
  • Adair County Public Library Joins the Missouri Evergreen Consortium
  • West Plains Public Library Joins the Missouri Evergreen Consortium
  • Sarcoxie Public Library Joins the Missouri Evergreen Consortium

Evergreen Community Positions

Jason Boyer
» Evergreen Community Developer; Evergreen Core Committer

Galen Charlton
» Evergreen Project Board, President; Evergreen Cataloging Interest Group; Evergreen Community Developer; Evergreen Core Committer

Jason Etheridge
» Evergreen Community Developer; Evergreen Core Committer

Rogan Hamby
» Chair of the Evergreen Outreach Committee; Evergreen Community Developer; Evergreen Conference Committee

Lena Hernandez
» Evergreen Documentation Interest Group

Stephanie Leary
» Evergreen Community Developer; Founder and Chair of the Evergreen User Interface Interest Group; Evergreen Outreach Committee; Evergreen Release Team

Andrea Buntz Neiman
» Evergreen Project Board, Secretary; Evergreen Outreach Committee; Evergreen Cataloging Interest Group; Evergreen Documentation Interest Group; Evergreen Documentation Committee; Evergreen Release Team

Mike Rylander
» Evergreen Community Developer; Evergreen Core Committer

Jennifer Weston
» Chair of the Evergreen Cataloging Interest Group; Evergreen Conference Committee; Evergreen Authorities Working Group

Evergreen Release 3.13, June 2024

3.13 Release Team
» Blake Graham-Henderson (MOBIUS)
» Bill Erickson (KCLS)
» Shula Link (PINES)
» Stephanie Leary (Equinox)
» Andrea Buntz Neiman (Equinox)

Other Equinox Open Library Initiative 3.13 Contributors
» Jason Boyer
» Galen Charlton
» Jason Etheridge
» Rogan Hamby
» Lena Hernandez
» Angela Kilsdonk
» Mike Rylander
» Jennifer Weston

Evergreen Release 3.14, October 2024

3.14 Release Team
» Ruth Davis (Evergreen Community Development Initiative)
» Blake Graham Henderson (MOBIUS)
» Jason Stephenson (C/W MARS)
» Josh Stompro (LARL)
» Jessica Woolford (Bibliomation)

Other Equinox Open Library Initiative 3.14 Contributors
» Jason Boyer
» Galen Charlton
» Jason Etheridge
» Rogan Hamby
» Lena Hernandez
» Stephanie Leary
» Andrea Buntz Neiman
» Mike Rylander
» Jennifer Weston

koha

vufind®
Search. Discover. Share.

Stephanie Leary, Equinox's Front End Developer, presented at the 2024 Koha-US Conference in Round Rock, Texas on accessibility in the Koha staff client. Her presentation highlighted the legal obligations libraries have to meet in terms of accessibility requirements. The key take away from the session was that accessibility is a fundamental and non-negotiable part of software development, even though it is considered a specialty niche in courses and textbooks.

As part of the discussion, Stephanie highlighted the recent changes to the ADA Title II regulations covering web and software interface accessibility and demonstrated how to test for compatibility with assistive technologies used by people with visual, hearing, cognitive, or mobility impairments. Stephanie went over some easy changes that could be implemented to make headings, landmarks, form submit buttons, and colors more accessible in the Koha staff screens.

Stephanie described some of the accessibility issues inherited from the stack of third-party tools utilized in Koha: Bootstrap, jQuery, and DataTables and how the community could advocate for change in those open source communities. Finally, Stephanie talked about the challenges disabled users face when reporting accessibility bugs in inaccessible bug tracking systems, and how the community might create other reporting channels that are friendlier to people using assistive technologies.

Everyone in the room was enthusiastic about learning more, and future developer meetings were planned to discuss testing tools and procedures. Equinox looks forward to working more closely with the Koha developer community to improve the interface for staff members as well as patrons.

Highlights

» Equinox Presents at the 2024 Koha-US Annual Conference

» equinoxEDU: Spotlight on Recent Koha Highlights and Features

A highlight of Equinox's work with VuFind® in 2024 was our collaboration with the Historical Society of Pennsylvania (HSP) to update two of their VuFind® systems. One of HSP's VuFind® indexes is Discover (https://discover.hsp.org), which brings together metadata from their library catalog, EAD records from their Archivists' Toolkit system, and digital records from the HSP Digital Library and the Philadelphia Record Photograph Archive.
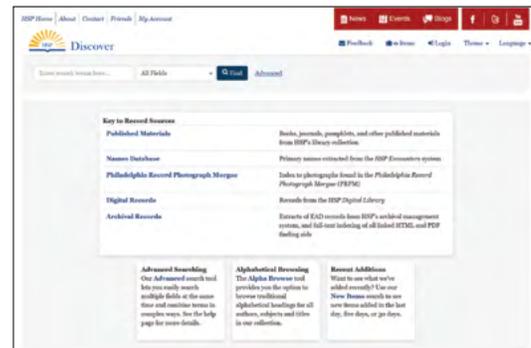
Equinox upgraded Discover from VuFind® 5 to version 9.1 and performed the first update of their library catalog metadata feed in years. HSP had historically developed a mini-ILS to maintain their library records, but later took advantage of an offer by the University of Pennsylvania (Penn) to host HSP's library catalog in Penn's Alma system. However, HSP was not in a position to switch Discover over to draw from the Penn catalog at the time. Equinox completed the changeover by working with HSP and Penn staff to obtain a data feed, and then update the records in VuFind®.

The other VuFind® system operated by HSP is Encounters (https://encounters.hsp.org), which brings together a variety of databases maintained by HSP to provide unified searching for their members. As part of the maintenance of Encounters, Equinox completed a project to add a new database of records from the Orphan Society of Philadelphia to Encounters, filling a gap in HSP's current workflow.

VuFind® is not only a discovery layer, but a toolkit for building highly customized discovery systems. HSP's Discover and Encounters systems exemplify VuFind®'s capabilities, and Equinox is proud to help HSP manage and evolve their use of VuFind®.

Highlights

» Equinox Presents on Aspen Discovery and VuFind® at the New Jersey Library Association 2024 Annual Conference

fulfillment

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.

Highlights

» Equinox Announces 2024 Q1 Open Source Project Contributions Including CORAL ERM, Evergreen ILS, and Fulfillment ILL

» Equinox Presents on Resource Sharing and Open Source Development at the 2024 American Library Association Annual Conference

subjectsplus

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. Our Education Team uses SubjectsPlus to highlight equinoxEDU events, disseminate training materials to our staff, and deliver training materials to migrating libraries.

Highlights

» Equinox Announces Digital Resource Partnership With Connecticut Library Consortium

coralerm

Working with client partners and CORAL Steering Committee members, Equinox developers made enhancements to the underlying structural design of the CORAL electronic resources management (ERM) software and addressed user identified functional workflow concerns in 2024. Equinox continues to serve as an Affiliate Member of the CORAL Steering Committee.

Two releases were made available to the CORAL community in 2024 with development and accessibility contributions from Equinox. The first, version 2024.04, included code provided by Equinox developers for an update to PHP support to version 8 and an update to jQuery 3.6.0 marking the first significant updates to programming languages in CORAL ERM in the last few years. The language updates provided key advantages to CORAL ERM performance including improved security, better memory management and improved caching to increase responsiveness. Various bug fixes were also identified and addressed during testing of the April release.

Equinox team members led efforts to work with CORAL ERM users to identify and resolve several numeric field display and calculation concerns in the CORAL ERM Resource Module. Equinox developers participated in troubleshooting, modification, and testing of code for the resulting version 2024.10 release. Equinox guided the coordination and scheduling of both 2024 CORAL ERM releases.

Equinox team members also conducted a preliminary accessibility review of the current CORAL ERM software to make proposals for compliance improvements to the CORAL Steering Committee. Initial code modifications by Equinox for accessibility improvements are on schedule for release and testing to the larger community at the end of 2024, with the goal of a full upgrade release to follow in 2025.

Highlights

» Equinox Announces 2024 Q1 Open Source Project Contributions Including CORAL ERM, Evergreen ILS, and Fulfillment ILL

» Equinox Announces New Release of CORAL ERM (2024.04)

» Equinox Announces New Release of CORAL ERM (2024.10)

Aspen Discovery

The Aspen Discovery community continues to grow! Equinox provides expertise to the community as an open source software focused nonprofit. Our status as a nonprofit organization serving libraries gives us a unique set of tools to bring to the conversation as we support the Aspen Discovery community's growth. This year we have been focusing on community building topics such as documentation and accessibility as well as contributing to the code base to help Aspen Discovery work more seamlessly with users of Evergreen ILS.

This year was the first ever AspenCon. Conferences like AspenCon are a wonderful way to build community and share knowledge. Equinox was proud to serve the community through both financial sponsorship of the conference and a conference presentation. Equinox staff Galen Charlton and Lena Hernandez, presented, "Building Documentation for Aspen: Implementation and Beyond." They were delighted to speak on the subject of building documentation, community information sharing, and ways to make sure that those materials are accessible. The presentation was well received and helped spark conversations that continued well after the conference wrapped up.


Aspen Discovery is a fully featured, open source discovery system with a single search box and smart search results formatted in ways that are patron-friendly to allow for easy access to materials. Aspen Discovery also provides tools for promoting the collection in a variety of methods beyond traditional searches, which help patrons more easily discover all the resources available through their local library. All of this combines to make Aspen Discovery an excellent system for libraries that are looking for creative ways to make every dollar of their budget count, and libraries are certainly taking note. Equinox has implemented 225 locations in the last year in addition to providing training to library staff in 141 public and academic library locations.
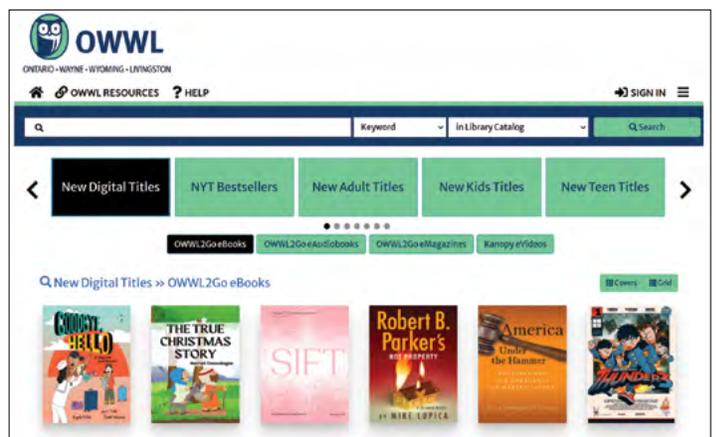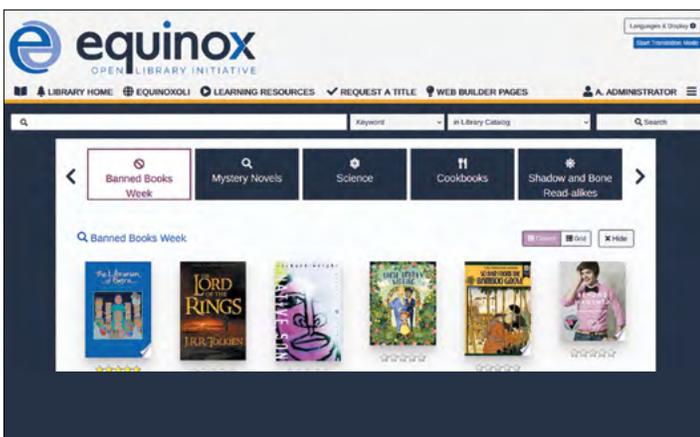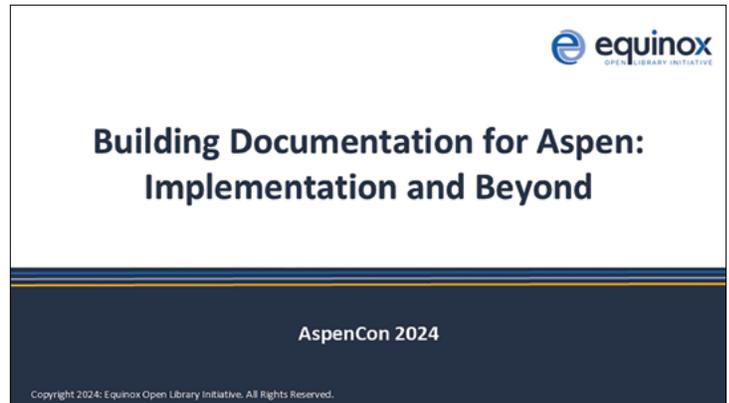
Equinox provided accessibility expertise on topics related to Aspen Discovery in presentations and equinoxEDU: Spotlights this year. Accessibility is a concern that is top of mind for libraries as they implement new digital systems, and Aspen Discovery provides tools and opportunities for libraries to make sure that their digital presence is accessible. March's equinoxEDU Spotlight highlighted ways to use Aspen Discovery tools to create visual branding themes that are both eye-catching and accessible to people with a variety of disabilities. November's Spotlight on using Aspen Discovery's web builder included some best practices to ensure a new library website created with Aspen Discovery meets current accessibility standards.

Highlights

» Equinox Open Library Initiative Sponsors AspenCon 2024

» Equinox Presents on Aspen Discovery and Open Source Tools at the Connecticut Library Association 2024 Annual Conference

» Equinox Presents on Aspen Discovery and VuFind® at the New Jersey Library Association 2024 Annual Conference

» Equinox Welcomes Lake Agassiz Regional Library to Aspen Discovery

» Equinox Welcomes the Evergreen Indiana Library Consortium to Aspen Discovery

» Equinox Welcomes Richland Public Library to Aspen Discovery

» Equinox Announces Digital Resource Partnership With Connecticut Library Consortium

» Equinox Welcomes the Municipal Library Consortium of St. Louis County to Evergreen ILS, Aspen Discovery, and MessageBee with the Missouri Evergreen Consortium

» Equinox Welcomes Southeastern Libraries Cooperating to Evergreen ILS and Aspen Discovery
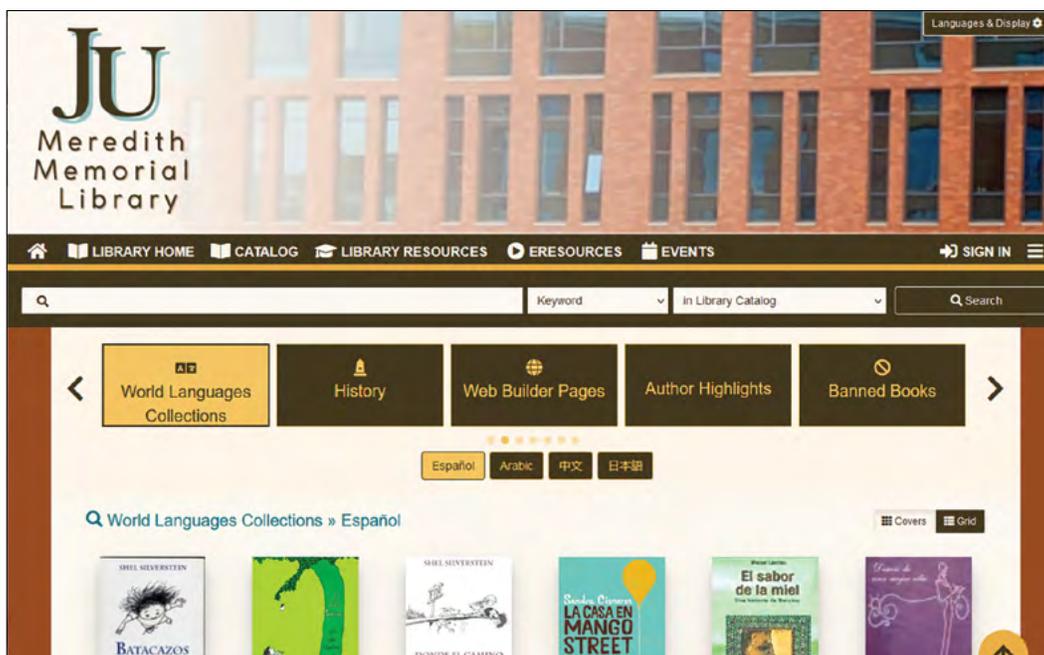
Instructional *Design*

EveryLibrary is a nonprofit organization that provides support for libraries which includes training library staff and volunteers to advocate for the needs of their communities. EveryLibrary partnered with Equinox on this project with goals that align closely with our values as a nonprofit.

The instructional design project was conducted in two phases. The first involved graphic design and branding, content analysis, and the creation of format prototypes. Coordinating with the work of a graphic designer contracted to Equinox, a collection of colors, logos, and slide deck templates was prepared for and reviewed with the EveryLibrary staff. The Equinox team analyzed and converted content from two existing EveryLibrary presentations into a proposed structure for slide decks, demonstrating the application of instructional design theories for the EveryLibrary online courses.

The second phase was for implementation. The Equinox team reviewed feedback from the design phase and instructional design discussions to convert content and create slide decks for all lessons in the informational course as outlined by EveryLibrary.

With the goal to create an engaging and effective learning experience, Equinox considered various different design theories and principles, and how best to translate them into practical instructional materials. The Equinox team worked with EveryLibrary to determine the audience, the format, the presentation mode, and the course objectives when selecting design models. For the asynchronous set of lessons to be hosted online and on demand, Equinox trainers applied Cognitive Learning Theory practices to optimize the effectiveness of the courses to facilitate the learning of new concepts.

Design concepts and instructional theories were discussed with EveryLibrary and agreed upon for implementation purposes. Keys to this design included the importance of not distracting the audience with too much information on each slide as well as keeping the visual noise on each slide to a minimum. A consistent structure was also important to maintain a familiar repetition to each slide deck for each lesson. Each lesson conformed to a uniform structure that involved a table of contents, a lesson guide, and a lesson summary at the end to conclude each slide deck, many of which were not available in the original content. The repetitious structure reduces distractions and keeps the mind focused on the key information being presented.

The final project resulted in slide decks for 48 separate lessons within 7 modules accompanied by suggestions for knowledge check prompts for each lesson. The response from EveryLibrary was extremely positive, reinforcing Equinox's work in the sphere of providing educational content and consultation. It was a tremendous experience and opportunity to work with EveryLibrary on this project, and Equinox looks forward to seeing the resources made available to libraries in the future.

Highlights:

» Equinox Partners With EveryLibrary to Provide Instructional Design and Educational Resources for Library Advocacy

Implementation

225
Aspen Discovery Libraries

9
Evergreen Migrations

4
Koha Migrations

238
Total Number of Migrations

Total Number of Item Records Migrated
2,370,889

Total Number of Bibliographic Records Migrated
2,970,000

Total Number of Patron Records Migrated
389,000

4 Koha Library Branches Going Live

44 Total Library Branches Going Live

40 Evergreen Library Branches Going Live

Migration Training Sessions (Hours Completed): **358**

Number of Consortial Add-On Projects **8**

Number of Distinct Source Legacy ILSs **10**

Number of Standalone Migrations **5**

Presentations

Conference Bibliography

Charlton, Galen and Lena Hernandez. "Building Documentation for Aspen: Implementation and Beyond." AspenCon 2024, 14 March 2024. Golden, CO. Presentation.

Charlton, Galen et al. "Bins and Bags and Boxes: Resource Sharing Infrastructure and its Challenges." Evergreen International Conference 2024, 23 April 2024. Online. Presentation. https://youtu.be/HfUe_5zxdIY?feature=shared

Charlton, Galen et al. "From User Group to Community: Software for Libraries By Libraries." ALA Annual, 29 June, 2024. San Diego, CA. Presentation.

Charlton, Galen. "Optimizing Resource Sharing: Evidence Based Approaches for Improving the Efficiency of Borrowing Networks." ALA Annual, 30 June, 2024. San Diego, CA. Presentation.

Hamby, Rogan and Ruth Frasur Davis. "Using Aspen as Your Evergreen OPAC." Evergreen International Conference 2024, 23 April 2024. Online. Presentation. https://youtu.be/EZqucsyQLAU?feature=shared

Leary, Stephanie and Jennifer Weston. "Let's talk about Koha Accessibility for Library Staff!" 2024 koha-US Annual Conference, 15 August 2024. Round Rock, TX. Presentation.

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Neiman, Andrea Buntz. "Aspen Discovery, CORAL ERM, SubjectsPlus: Unlocking Collections With Open Source." CLA Conference 2024, 29 April 2024. Groton, CT. Presentation.

Neiman, Andrea Buntz et al. "Library Discovery Layers: Peeling Away the Mystery." NJLA Conference 2024, 31, May 2024. Wildwood, NJ. Presentation.

Neiman, Andrea Buntz and Ruth Frasur Davis. "New Features in Evergreen 3.11+: The Ruth and Andrea Show Version 5.0." Evergreen International Conference 2024, 24 April 2024. Online. Presentation. https://youtu.be/zZXKJfLaLUU?feature=shared

"We are excited to announce our migration to the Missouri Evergreen Library Consortium, seamlessly facilitated by the professionalism of the Equinox staff."

—Greg Carter, West Plains Public Library