Experiences of Migrating to Koha and Evergreen

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Overview of the Research
- Open Source Software Integrated Library Systems (OSS ILSs)

Research Process

Migration Process

Challenges of Adoption
Overview of the Research

- Four phases
- Phase 1: Experiences and expectations
- Phase 2: Process of adoption
- Phase 3: Building an information portal
- Phase 4: Evaluation and follow-up
Research Process

- Surveys
- Interviews
- Case study

- Phase 4:
  - OSS ILS follow-up interviews
  - Proprietary ILS surveys
Migration Process

“The migration process is painful but it is critical to being happy with your installation after you go live.”
Stage in the Process

- Fully migrated
- Adding libraries
- Changing vendors
- Mid-cycle development
Customization

- Prefer original source code
- Enhancements for specific environment
  - Consortia
- Enhancements to improve effectiveness
  - Holds
  - Overdues
Vendor Roles

- Maintenance
- Enhancements
- System hosting
- Troubleshooting
- Answering questions

“Don't be afraid of open source because if you want a fully hosted and fully supported software Koha can be that.”
Sources of Technical Support

- Vendor
- Consortium
- Library staff
- Neighboring libraries
- OSS community listservs

“It doesn't have to be scary at all. You can let somebody else take care of all the support for you.”
Interaction with OSS Community

- Consortium staff only occasionally
- Listservs
- Local institutions
- Development ideas
- Asking questions
Documentation and Training

- Vendor
- Consortium
- Other libraries
- In-house
- OSS community
- Webinars
- Open Web

“It's just one of those things where having more people participate and be understanding of what's going on leads to a better product.”
Patron Response

- **Rapid adaptation**
  - No change in interface
  - Easy search features

- **Confusion**
  - Holds
  - Item locations
  - Errors
Staff Response

- "Love it"
  - New hires
  - Training
  - Improvements

- Frustration
  - Frequent changes
  - Response time

"The whole point of open source is that you can change it. If you can't change it because you didn't invest in the right kind of expertise, then it's just another vendor that you're entirely dependent on."
Expectations

• Low
  ◦ Development inertia
  ◦ Poor documentation
  ◦ Lack of expert support
  ◦ Need aesthetic enhancements

• High
  ◦ Powerful system for low price

“As a tiny library we could never have afforded to get a system, a traditional system that had this kind of dynamics to it and the power that the system has.”
Changes to OSS ILSs

- Stability
- Interface design
- Improved modules
- Authority control
- Consortial sharing
- Specific library types
- New release documentation
Lessons Learned

1. **Realize it’s not “free.”**
2. **Let someone else go first.**
3. **Get support.**
   “This isn't a one-person task. It takes multiple people and you're going to have to pay for good support or you're going to have to have a lot of in-house support. It's still worth it.”
4. **Give yourself enough time.**
   “You absolutely must have time. It's not something you can do quickly. You can't rush this because your staff deserves more than being rushed into something that you're not prepared for.”
5. **Be a sophisticated consumer.**
   “The biggest lesson we have learned is to be very careful in assessing what the state of the software is, and more importantly, what the vendor is like that you’re going to be using as a support vendor.”

6. **Clean up your data.**

7. **Don’t shortchange your training.**
   “Training is really an ongoing requirement. It’s not a one-time thing before you go live. It’s something that you need to keep after with people.”

8. **Be comfortable with tweaking.**
   “Koha adapted to us. We just told Equinox what we wanted and how we wanted things to work and Koha is just flexible enough to work around us.”
Challenges of Adoption
Proprietary ILSs

- **Pros**
  - Mature system
  - Technical support
  - User community

- **Cons**
  - Cost
  - Slow development
  - No control
OSS ILSs

- **Pros**
  - Cost
  - Flexibility

- **Cons**
  - Hassle
  - No expertise
  - Functionality
  - Reliability
Publications


Websites

- **Project Website**
  www.oss-research.com

- **OSS ILS Website**
  www.opensourceils.com
OSS ILS Website Overview

- Information portal for librarians interested in OSS ILSs
- Consolidates the issues
- Resources AND research
- Within one week:
  - Over 1000 visits
  - Over 50 countries
“I have been trying to investigate the various open source ILS out there, and have been bouncing from place to place without being able to get a good handle on the topic…Thank you, thank you, thank you!!!!”

“I am a library technology consultant working in the area of open source ILS…We’ve needed something like what you’ve created for awhile!”

“Please accept my thanks for informing us about this site that has been created with plenty of creativity and feeling of selfless giving to others.”

“Great work! It is fantastic that you have put so much work into compiling this information and I am sure it will be a great resource for libraries.”
Thank you!!!