

## A Guide to Major OSS ILS Staff Training Resources

### **The Role of Staff Training: Why and How?**

Libraries migrating to OSS ILSs should train their staff members on the new system. Doing so will make the migration process much smoother and better enable staff members to perform their jobs and train and market the new system to patrons.

According to the general [Migration and Training](#) PowerPoint presentation at the 2010 Growing Evergreen International Conference, the first step of staff training is for each individual library to assess its training needs.<sup>1</sup> Who needs to be trained about what tasks? Sometimes consortium and local administrators, IT staff, and frontline staff all need to be trained on different things. When and where should they be trained? For example, should they be trained on site, online, or in a combination of both? Training close to a “Go Live” date also tends to be the most effective. How should training be done? Should a vendor come in to train all staff members, or should one staff member learn the system and then train the others? Some libraries choose not to use a vendor at all and instead creating staff training materials from OSS ILS community documentation freely available online.

Finally, why should staff be trained on OSS ILSs? The presentation argues that such training can reduce staff anxiety, create staff enthusiasm, increase patron confidence, and reduce future support tickets to a vendor. To train effectively, library administrators must talk with their staff about OSS ILSs, give them the opportunity to practice working with a demo site hands-on, available documentation from the community, and how to get help. Administrators must also talk with any vendors used for training about their libraries’ unique workflows, staff skills, current system requirements, and future goals.

Overall, the type of staff training done is not as important as doing staff training in general. Think about your unique needs as a library when deciding exactly how and when to train staff members. All types of staff training should involve task-related “homework” that individual librarians must work through to learn the new system.

There are a few examples of training materials available online for both the Evergreen and Koha OSS ILSs. Unfortunately, there is not a lot available about training specifically, so libraries in the migration process are often forced to rely on vendors or work through the community documentation themselves. Having more libraries using Evergreen and Koha contribute and share their resources on the web would greatly help other libraries. If you are a library using Evergreen or Koha and want to share your resources on this website, please contact us on our [Forums page](#).

### **Staff Training Materials for Evergreen**

One of the first places to look for training materials on Evergreen is PINES, the Public Information Network for Electronic Services, a program of the Georgia Public Library Service. The PINES Evergreen documentation page provides many detailed [training documents](#) that libraries migrating to Evergreen will certainly find useful.<sup>2</sup> There are

documents to help with training related to circulation/the OPAC, reporting, cataloging, and computer reservations. The circulation documents are the most prolific and include information about demos, “try it yourself” exercises, template patron registration forms, and other example training materials. The reporting documents provide a glossary about this module, discuss software permissions and navigation, and include a variety of templates. The training outline for cataloging provides information about such key functionalities as editing MARC records, deleting barcodes, merging records, and authority control. Finally, the documents allow users to learn how to update the computer reservation system.

For staff members who are visual and auditory learners, PINES also has a [YouTube playlist](#) with video tutorials about Evergreen.<sup>3</sup> Tutorials are available on starting the software and how version updates affect circulation, accounts, and reports. Indeed, tutorials are a popular way for individual libraries to share their staff training resources, as well. The [Evergreen Community Tutorials page](#) includes links to a number of videos and other resources contributed by libraries that use the OSS ILS.<sup>4</sup> There are short videos on reports and circulating pre-cataloged item, long videos on acquisitions and importing and exporting MARC records, documentation from developers such as OpenSRF and JSON Queries, and guides and manuals for collections and training on other topics. The [Pendleton Public Library](#) also has its own short video tutorial on searching the Evergreen catalog.<sup>5</sup>

Individual libraries and consortia have also made many of their Evergreen staff training materials directly available to help other libraries in different stages of the migration process. The [Indiana State Library](#) has a page on its website dedicated solely to providing access to its Evergreen staff training documents.<sup>6</sup> These documents are a recommended resource and contain highly detailed discussions of Evergreen’s circulation, cataloging, reports, and administration modules. The circulation materials include manuals, lists of contacts, video tutorials, presentations, and webinars and address topics such as installing the software, registering patrons, billing, and placing holds. The cataloging materials include weekly tips, yearly topical discussions, and a final, updated manual on topics such as logging in, searching the catalog, changing call numbers, and creating records in Evergreen. Finally, the reports and administration materials include tutorials, templates, advanced guides, and indexes to topics for libraries to use.

Other general library websites also provide useful information and articles about Evergreen staff training. For example, the Bibliomation site has an [Evergreen FAQs](#) page that answers questions library staff may have about circulation, the OPAC, cataloging, acquisitions, reports, notices, possibilities for future development, and demo sites.<sup>7</sup> Some example questions are How often will updates happen? How do I merge patrons? Why isn’t the spell checker better? and How are notices sent out?

### **Staff Training Materials for Koha**

There are even fewer resources about staff training on Koha than there are for Evergreen, but some of the materials available are still quite useful for libraries in the migration process.

The Koha community has a [training page](#) that posts updates about training opportunities and workshops.<sup>8</sup> It does not include materials directly available for library use but does provide the opportunity for libraries to network and receive training from the Koha community.

Although one might expect that OSS ILS vendors would guard their training materials in the hope of earning a profit, the vendor [ByWater Solutions](#) makes some staff training tutorials for Koha freely available online.<sup>9</sup> A variety of short tutorial videos cover topics such as item modification, reports, tags, defaults, acquisitions, cataloging, special features, and more in Koha.

Much like the Evergreen staff training materials, some libraries that use Koha have made their training materials available online for other libraries to use. The [NExpress Regional Library Catalog](#) from the Northeast Kansas Library System has lots of useful links to tutorials and guides about Koha.<sup>10</sup> Materials address patron training, circulation, cataloging, reports, and going live. Some of the patron training topics include adding accounts and accessing e-books. The circulation materials introduce staff members to the staff client's functionalities, including checking in and out, placing holds, issuing library cards, advanced searching, tagging items, etc. Libraries that want to learn more about classifying items, adding items to existing bibliographic records, and staging MARC records for import into Koha should consult the cataloging materials. The reports materials provide information about commonly run reports and links to relevant Koha documentation and developers' wikis. Finally, the "going live" section provides staff training materials about such issues as offline circulation and configuring printers. Something unique about this section is that it also offers templates for promotional materials that can be distributed to patrons throughout the library.

Finally, some individual websites also have useful staff training materials for Koha. For example, B. W. Johnson's "[Newbie Guide](#)" may be only a single article rather than a series of links to more detailed documentation, but it provides a very useful introductory read for library staff just beginning to familiarize themselves with Koha.<sup>11</sup> It discusses how to catalog items (especially in consortia), manage accounts and budgets, work with item types and circulation codes, and enter MARC records. This guide is written in such a basic, easy-to-understand way that even librarians with no experience on an ILS at all could use it as a first step in training.

## **Links to Staff Training Materials**

### *General Materials*

1. Migration and Training Presentation at the 2010 Growing Evergreen International Conference <http://www.open-ils.org/dokuwiki/lib/exe/fetch.php?media=advocacy:migrationandtraining-fortin-tetterton.pdf>

*Evergreen Materials*

2. PINES Evergreen Training Documents [http://www.open-ils.org/dokuwiki/doku.php?id=pinet:training\\_documents](http://www.open-ils.org/dokuwiki/doku.php?id=pinet:training_documents)
3. PINES YouTube Playlist  
[http://www.youtube.com/view\\_play\\_list?p=E5731A9BB3148527](http://www.youtube.com/view_play_list?p=E5731A9BB3148527)
4. Evergreen Community Tutorials Page [http://www.open-ils.org/dokuwiki/doku.php?id=community\\_tutorials](http://www.open-ils.org/dokuwiki/doku.php?id=community_tutorials)
5. Pendleton Public Library Evergreen Catalog Tutorial  
<http://www.pendleton.plinkit.org/tutorials/evergreen-software-for-sage-library-catalog.html>
6. Indiana State Library Evergreen Staff Training Documents  
<http://www.in.gov/library/3380.htm>
7. Bibliomation Evergreen FAQs <http://biblio.org/evergreen-faq/>

*Koha Materials*

8. Koha Community Training Page <http://koha-community.org/category/koha-training/>
9. ByWater Solutions Staff Training Tutorials  
<http://bywatersolutions.com/section/tutorial-videos/>
10. NExpress Regional Library Catalog Training Materials  
<http://www.nexpresslibrary.org/training/>
11. B. W. Johnson's "Newbie Guide" <http://www.pakban.net/koha/tut/newbie.html>