Agenda

- Overview of the Research
- Open Source Integrated Library Systems
- Best Practices for Adopting Open Source ILS
  - From research to Live ILS!
- Next Steps
  - Getting Involved
  - Keeping Updated
Overview of the Research

- Three Phases
  - Phase 1
    - Experiences and Expectations
  - Phase 2
    - Process of Adoption
  - Phase 3
    - Building a information portal
Research Process

- Phase 1
  - Surveys from across the country

- Phase 2
  - Surveys and Interviews

- Phase 3
  - Interviews and
  - A Case Study
Case Study

- HAL Consortium
  - About 15 libraries right now
  - Eventually 175 libraries in the entire consortium
Process of Adoption – Key Stages

1. Research / Evaluation
2. Demo Site
3. Data Preparation
4. Data Migration
5. Staff Training and User Testing
6. Live ILS
Stage 0 – General Guidelines

- Develop Internal Technical Skills
- Have a Demo System – training and developing skills
- Communication is key
  - Within Library
  - With Vendor
  - With branches/consortium
- Be prepared to commit staff time
(If) Working with Vendors

- Read Contracts Carefully
- Explicit Timeline
- Guaranteed Access to Code
- Support the problem statement with examples
- Designate a liaison between staff and developers
- Communication!
Stage 1 – Research / Evaluation

- Decision making process
  - Who makes the decision?
  - How much they know about OSS?
- Research at other libraries
- Know the abilities and commitment of your staff
- Make a list of “must have” features from your current ILS
Stage 2 – Demonstration Site

- Have a demo site
  - Can be used in evaluation if your library is unsure which ILS to choose, one option is to test both and see which works better for your situation.
  - Doing at least one test migration will show what kind of data prep needs to be done, usually by doing data mapping. Data mapping is where you determine where the fields in your current system go when move into the new system. Another often used term for data mapping is staging tables.
Stage 2 – Demonstration Site

- The demo site is also a good way to do staff training.
- Also provides a way to determine what the best setup (rules, policies, settings, etc) are by testing them in advance.
- It provides an opportunity to learn the processes of the different modules and how they differ from your library’s current practices.
- Most importantly, it serves as a test run for migration which should serve to make the actually migration go smoothly.
Stage 3 – Data Preparation

- **Clean up data in advance.** The better the data is the easier it will transfer. This is also an opportunity to start fresh in a new system. So if there were inconsistencies or irritations in the old system now is the time to fix it.

  - Weeding – if you have records (either materials or patrons) that are out of date now is the time to get rid of them. The few records the easier migration will be.

- **Consistency is key.** If multiple people are working on the data make sure they are working based on the same standards.
Before doing any customization make sure it hasn’t been done already. Make sure that you aren’t reinventing the wheel. The great thing about open source is that any development done by any library comes back to the community, so often if you want something done someone else does too.

Look for partnerships. Often if you want a specific development someone else does too. There are many advantages. If your staff doesn’t have the expertise then you could provide more of the funding and the partner could provide the tech skills or vice versa. Partnerships means the development will cost less than if you did it alone.

Grant money is another funding option.
Stage 4 – Data Migration

- **Spot check data** (testing, during and after migration). Catching problems early means less work trying to fix problems later.

- Write workflows and policies/rules beforehand. Writing these during working on the test site, should provide step by step instructions on how to do the final migration.

- If working with vendor, regular communication is important.

- If many libraries, migration in waves makes things easier.

- For a consortium that is coming from multiple ILS, having vendor will make it easier.
Stage 5 – Staff Training and User Testing

- **Who does the training?**
  - If **by vendor** there are two options
    - The vendor sends someone to the library to conduct training
    - Train the trainer: the library sends someone to the vendor for training and then they come back and train the rest of the staff.
  - If **internally**, there are a lot of training materials available. There are several libraries that after creating their materials, they’ve made it available online. This is another time having contacts with other libraries can help.

- **Documentation is important.** Best way is to find what documentation is already available then customize it for your system.

- **Do training fairly close to Go Live date.**
Stage 5 – Staff Training and User Testing

- **Usually a day or two of training**, but staff may only need part of it because training usually covers circulation, cataloging, and admin.

- **If consortium that is spread out geographically use webinars and wikis.**

- **When doing training have specific tasks to do.** This can be done a few of different ways.
  - Do the specific tasks at the training.
  - Demonstrate the tasks at training and then give ‘homework’ where the staff does the specific tasks independently. To implement this option, staff has access to a demo system.
  - Have staff try the tests on their own and use the training session for questions or problems they had.
Stage 6 – ILS Live and After

- Marketing for Patrons

- Most libraries haven’t done anything elaborate. Generally just announcements through posters, local paper, flyers, and on website.

- If the migration is greatly changing the situation for patrons then more marketing. Can set up a demo computer for patrons to try or hold classes once the system is up
Stage 6 – ILS Live and After

- **Training for Patrons**
  - Most libraries didn’t find this necessary. Either the system is easy to use or it’s set up to look like old system
  - If training, mostly doing presentations and demos especially in corporate time libraries or those with a limited number of patrons
  - Another option is to create online tutorials.
OSS ILS Information Portal

Created by this group
Opensource ILS
A portal for research and sharing of information

"Open source is what we are...
You can tweak it the way you want."

-public library Evergreen user

Navigation

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The objectives of OpenSource ILS are to provide a convenient gateway to these resources, share the

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Project Website: http://oss-research.com/
Thank you!