

# Library Systems Migration: We're Live, Now What?

by Karen Douglas

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In this age of rapidly changing technology, it is inevitable that libraries will find themselves migrating to an online library system that will more efficiently serve their needs. According to the literature, this phenomenon is likely to occur every five to ten years.

There is a wide body of information available on how to prepare a Request for Proposals (RFP) for an online system, selecting and evaluating online systems, and preparing data for migration. However, little has been written about making the new system work for your library after it goes "live." As a "survivor" of three different online system migrations, I would like to make a few suggestions on how to proceed in making your new system work for you.

## Pre- and Post-Migration Work Needed

In an online integrated system, one with several different modules, the transition to a viable working relationship between staff and system will vary with each module. For the Cataloging, OPAC, and Circulation modules, most of the work necessary to make a smooth transition is done before the migration actually takes place. Bibliographic, patron, item, and fine records are carefully examined to make sure that accurate data are migrated from the previous system. Once all these data have been mapped and examined, test loads of the data are made into the new system.

The data are again carefully examined to make sure that they have migrated in a viable format. Some clean-up work may be necessary after migration in the Cataloging and Circulation modules. Errors from the old database are usually discovered at this point. If the library lacks authority control, clean-up may be needed for authority and headings records as well. After the data are found acceptable, the system is ready for use.

In Acquisitions and Serials modules, most of the work takes place after the system goes "live." In many cases, data do not transfer. Many libraries that may have had Circulation, OPAC, and Cataloging online in their previous systems are migrating from manual serials and acquisitions systems or from automated systems where data cannot transfer. Thus they are faced with the daunting task of data entry for serials check-in records, acquisitions vendors, and purchase orders.

The keys to making this transition as painless as possible are thorough training, advance planning, flexibility, and willingness to seek help from others.

Training is vital for staff working with all modules. Ask as many people as possible to attend the training offered by the online system vendor. It would be ideal if there could be separate training sessions for each module. Try to schedule training as close to your "live date" as possible. Training more than a couple of weeks before then may be useless because little of what you learn will be retained. Most

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automated systems offer a training database where staff can practice these new skills before actually using them on a live system. Make sure enough data are available in the training database so that the functions of the modules can be performed exactly as they will be on the live system. Provide enough exercises for staff to become familiar with the new procedures they will need to perform.

Identify the learning styles of the staff who will be trained. Some will feel more comfortable reading the manual, while others will benefit more from the hands-on approach. Give staff access to the portions of the procedure manual that pertain to their jobs. It is often necessary to clarify or augment instructions in the manual to make it conform to your library practices.

In Circulation, OPAC, and Cataloging modules, the new system can be used immediately once it is live. For Acquisitions and Serials modules, it may be necessary to operate both the old and new systems until the majority of data entry is completed. Project how long it might take to get most of the data entered. Establish a cut-off point for entering data into the old system. Serials check-in records for the items received most frequently should be created first. It is very helpful, if feasible, to get reports from your old system that give details of check-in, vendor, and purchase order records to which you can refer as you create your new records. This is especially vital if your old system will go down before this process is finished. Expect that data entry will actually take longer than originally predicted. Even though this will be a lengthy process, creating new check-in records and purchase orders for serials will have the added benefit of giving you a chance to examine items in your collection and correct any serials problems that may surface.

As you work through the process of making your new system function smoothly, you will notice **differences in workflow**. During this period, staff should expect that procedures may be modified frequently to make your online system meet your library's specifications. Supervisors should work closely with the staff who will be using the system on a daily basis to make sure that procedures devised work as well in practice as they do in theory. If the staff have a hand in making procedural and workflow changes, they will probably be more cooperative during these fluctuations.

# A Desktop Learning Opportunity

## Seek Out Others

Make contact with another library that has survived a migration under circumstances similar to those in your library. Your online vendor can give you the names of libraries similar to your library. A visit and/or phone call to these institutions can provide insight on the system. Most online systems have a listserv for their users. This is a valuable source of information about your system from the vendor and the other users. Questions about any aspect of system operations can be posted and helpful responses are usually sent quite promptly. Also keep the phone number of the vendor help desk nearby. Online systems also have user group meetings both regionally and nationally at least once a year. It is extremely helpful for as many staff as possible to attend these meetings because there are presentations by both users and the vendor that will bring clarification to many aspects of the system. Prepare a list of problems and/or concerns you have about using your

system to bring to this meeting and you should be able to find answers there. Also, users groups may have Web sites where they post short cuts, training manuals, and other helpful hints. Why "reinvent the wheel" when someone has already found a way to do something! Other libraries are usually quite willing to share procedures and training manuals.

It takes from six months to one year to feel comfortable with the new system. However, adjustments in workflow and procedures will be continual as online systems generally have an annual upgrade that will enhance and refine the system's capabilities.

In the high tech era in which we live, the only constant is change. Flexibility and willingness to seek and share knowledge with others will make it easier to survive your system migration and the others that will surely follow.

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## Resources

Agnew, Grace, *Online System Migration Guide*, LITA Monographs 7.

American Library Association, 1996

*Colorado Libraries* 23(Winter, 1997):4  
Entire issue devoted to system migration.

Epple, Margie, "Staff Training and Automated Systems: 20 Tips for Success," *Journal of Academic Librarianship* 18 (May, 1992):2

Hallmark, Julie, "System Migration: Experiences from the Field," *Information Technology and Libraries* 11(Dec 1992):4

*Integrated Library Systems Reports* (<http://www.ilsr.com>): Online monthly journal written by law librarians with articles on automated library systems. Includes links to articles and reviews on library automation, sample RFPs, automated system vendor information, etc.

*Acqweb* has links to the Web pages of many automated library system vendors (<http://www.library.vanderbilt.edu/law/acqs/pubr/opac.html>)