ILS Migrations

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ILS migrations are hard, but doable.

In other words: "You got this!"
5 Key Lessons

- Know your needs, and whether migration is right for you
- Know your people + your vendors and what they can and can’t do
- Make a plan but be ready for change
- Data is key
- Identify legacy processes and opportunities to improve
Definitions

- ILS: Integrated Library System
- ILS Migration
- ILS vs. LSP
- Open Source vs. Proprietary
History of Integrated Library Systems and Why ILS Migrations are Important

Precursors to the ILS

”Library Automation”

Systems Evolution

Approximately 800 libraries change ILS per year

You will probably experience an ILS migration several times during your career
Lesson 1: Know your needs, and whether migration is right for you

DO YOU WANT/NEED TO MIGRATE?
COST/BENEFIT ANALYSIS
ILS FEATURES
OLD ILS NO LONGER SUPPORTED
INSTITUTIONAL SUPPORT
Lesson 2: Know your people and your vendors

**Your Resources**
- Responsible Parties
- Staffing levels
- Ways of communicating change
- How much time can you devote to this project?
- What do your patrons want and expect?
- Existing and desired workflows

**Vendor Resources**
- Do you need a vendor?
- Complexity of product
- Open source vs. proprietary software
- Reliability of product
- How is support provided
- Differentiating features + whether you need them
- Local laws

Vendor reviews: Library Technology Guides + Ask
Lesson 3: Make a plan, but be ready for change
HCCC: Our Migration Story

• Original Team
• Our plan
• Timeline
• Rollout
• Changes along the way
Lesson 4: Data is Key
Preparation - Testing on Test server

**What we did**
- Set up a test server
- Defined codes for libraries, authorized values and item types, etc.
- Imported pre-selected data from legacy ILS to the test server
- Tested functionality of Koha modules
- Examined features of Koha OPAC and its display

**What we learned**
- Koha has all the modules/functions to replace our current ILS
- OPAC display is clear and informative
- Some additional features are worth our consideration

**Decision we made:**
- Data migration and maintenance is more complicated and challenging than we expected
- An experienced vendor is needed to facilitate this process
Migration of Bib/Item Records—Data Clean Up

Reasons for data clean up:

- To guarantee a smooth migration
- For a fresh start with daily operations in Koha
- Necessity for post migration work, such as authority processing

What we did with clean up:

- Weeding—planned and completed long before migration
- Cleaning up—all unwanted bib/item records, such as withdrawn bib/item records.
- Changing data—on bib/item records based on the needs, for example:
  - Reclassified e-resources from generic call number “EBOOK” and “STREAMING VIDEO” to LC call numbers
Migration of bib records – MARC Framework

Koha MARC framework is a template for creating new bibliographic records and also it decides how bibliographic/item level information will be loaded into Koha database during migration.

MARC21 framework is used for the implementation.

Our vendor prepared a MARC framework for migration.

We made sure that every field and subfield were defined in the MARC framework and added what we needed, for example:

• 264 RDA tag and related subfield codes.
• Subfield 0 for 1XXs, 6XXs, 7XXs, etc. (for authority record control number or standard number)
Migration of item records - Overview

• In data migration, no physical item records are exported/imported in the process

• Instead, item records are generated based on item level information in Koha 952 field when loading of bib records

• The subfield codes for item level information in Koha 952 are coded differently from those in legacy ILS 999, for example:
  ▪ Subfield code for library in Koha is $a; in legacy ILS is $m.
  ▪ Subfield code for call number in Koha is $o, in legacy ILS is $a.

• The important issue in data migration is to correctly transfer item level information in 999 field of legacy ILS to Koha 952
Migration of item records - what we did (1)

• Vendor generated report with detailed information related to subfield codes of item records based on the data we sent

• We worked with vendor on:
  ▪ identifying each of the subfield codes
  ▪ deciding which subfield to use/keep
  ▪ mapping the subfield codes of the two ILS

• Note: Mapping every subfield code which is essential to circulation. Certain non-essential subfields were ignored if no corresponding subfields found in Koha.
Migration of item records – what we did (2)

• Before loading bib/item records to Koha, codes must be defined/created in Koha Administration, such as: Library, Location, Collection, Item type, etc.

• Instead of using the original codes from legacy ILS, we simplified the codes, for example:

<table>
<thead>
<tr>
<th>Location code in Legacy ILS</th>
<th>Location code in Koha</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHILD_COLL</td>
<td>CHL</td>
</tr>
<tr>
<td>DVD_COLL</td>
<td>DVD</td>
</tr>
<tr>
<td>ESL_READ</td>
<td>ESL</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item type code in Legacy ILS</th>
<th>Item type code in Koha</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOOK</td>
<td>BKS</td>
</tr>
<tr>
<td>EBOOK</td>
<td>EBK</td>
</tr>
<tr>
<td>REF_BOOK</td>
<td>REF</td>
</tr>
<tr>
<td>...</td>
<td>...</td>
</tr>
</tbody>
</table>

• Vendor converted old codes to new codes when mapping the data.
Pre data migration – verification on test server

Testing/checking before going live

- Vendor migrated data to the migration test server
- Both vendor and library staff participated in testing and checking of:
  - System configuration, functions, OPAC display, bib records, item records, etc.

The importance of checking and testing

- Found mistakes – both from us and from vendor
- Got new ideas of how to rearrange certain data
- A lesson learned: we forgot to check diacritics of bib records and had to do extra work after the server went live
Post Data Migration - Inventory

**Reason**
- to make sure everything was migrated and migrated properly.

**When**
- two weeks after production server went live.

**Equipment and tools/report to be used:**
- Laptop, scanner, Microsoft notepad
- Koha inventory tool, and a Koha inventory report

**Result**
- further clean-up for unwanted records and correction of errors.
Post data migration - authority processing

Ready for authority processing after inventory

Subscribed following services from authority processing vendor:

- Authority control
- Bibliographic processing
- RDA conversion
- Linked data—adding subfield zero ($0) with URIs to access points in bib records (currently inactive; for possible future use)
- Ongoing Maintenance of authority records

Vendor helped with:

- extracting data from Koha server
- loading the authority records and the updated bib records back to migration server for testing
- and then reloading to production server.
Summary

• By experimenting on test server:
  ▪ we got to learn Koha better
  ▪ we established an efficient communication channel with vendor

• With the vendor support:
  ▪ we saved time and guaranteed a smooth migration
  ▪ we felt more confident with new Koha system, and got all the support whenever an issue came up
Lesson 5: Identify legacy processes and opportunities to improve
Public Services/Circulation

- Original training
- Training Materials
- Overlap period
- Unexpected issues
- Flexibility
Rollout: Branch Campus

- Differences in collection
- Training differences
- Impact of new procedures on staff workflows
Post Implementation + Conclusions

- Test server
- Change continues
- Statistics
Additional Resources

• Library Technology Guides: https://librarytechnology.org/
• ACRL Tech Connect: https://acrl.ala.org/techconnect/post/a-high-level-look-at-an-ils-migration/
• Marshall Breeding American Libraries Features: https://americanlibrariesmagazine.org/authors/marshall-breeding/
Questions?

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