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A Tale of Two Systems: One Library's Experience Migrating to a New System and Back

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A Tale of Two Systems: One Library's Experience Migrating to a New System and Back

Abstract

The decision to migrate to a new library system is generally a long-term decision. The integrated library system, which some now call library platforms, impact many if not all facets of the library experience. Making a transition to a new system impacts all staff and our patrons on some level. In addition to the traditional services included in a library system we are increasingly seeing new services pop-up including electronic resource management systems, discovery layers, and program management systems, as part of the new library platforms. According to Marshall Breeding's, Library Perceptions 2017 Survey, a little more than 28% of libraries surveyed were "shopping" for a new system.

The William Allen White Library, at Emporia State University, after roughly 20 years with Innovative Interfaces, Inc., decided to migrate to OCLC's WorldShare Management Services(WMS). The migration began mid-2013 and WMS went live in January 2014. Fast forward to 2017, where the decision was made to migrate back to Innovative Interfaces, Inc.. The migration began Fall 2017 with an eventual go-live date of June 2018 for Innovative Interfaces, Inc's, Sierra system. This presentation will focus on this library's experiences ending with recommendations for migration projects.

Keywords

migration, ILS, systems, next generation, cloud-based

A Tale of Two Systems: One Library's Experience Migrating to a New Integrated Library System and Back

The purpose of this article is to share the experience of William Allen White Library at Emporia State University (ESU), as they completed two integrated library system (ILS) migrations. The hope is that other libraries may benefit from these migration experiences who may be considering an ILS migration. A brief history about the ESU Library will be shared to provide context for the reader. Additionally, reasons a library may consider changing integrated library systems will be discussed. The migration experience for each of the migrations will be shared as well as the challenges and success of each. Finally, recommendations will be shared for consideration when migrating to a new ILS.

Background

The William Allen White Library at Emporia State University (ESU) is referred to as a single site in regards to integrated small branch libraries on campus. Collection size is around 800K bibliographic records. For a variety of reasons which will be discussed later in the article, ESU decided to migrate to the OCLC Worldshare Management Services (WMS) system. Prior to the migration to WMS, the library had been using the Innovative Interfaces, Inc., Millennium software. William Allen White Library had partnered with Innovative for almost 20 years. During their time with Innovative the library faculty and staff had created extensive workflows and were very comfortable with the ILS. The Library Dean at the time made the decision to move to OCLC WMS and the implementation began in the fall of 2013. The WMS system went live in January of 2014. One factor that played a large role in the migration to WMS and the subsequent migration back to Innovative was a change in leadership. Under the leadership of the Dean of the Library at that time the first migration was planned and completed. In the fall of 2016, the library welcomed a new Dean of the Library. In early 2017, the new Dean of the Library, made the decision to transition from OCLC WMS back to Innovative Interfaces, Inc. (III), Sierra software.

Reasons for Change

There are many reasons to consider migrating to a new library integrated library system. At ESU, the annual licensing cost from our ILS vendor was a big reason to look at other options. Additionally, at the time of the first migration, ESU hosted the server-in-house and it was due to be replaced. This was a considerable expense even for an existing integrated library system beyond the annual licensing cost for the software. There were many changes to technology since the server was first employed and consideration was given to moving to a hosted solution. This increased the annual cost but removed the cost of refreshing the server hardware.

New innovative systems were being developed and Marshall Breeding (2015) identified them as "library services platforms", this innovation in "platforms" included increased functionality such as API's, link resolvers and electronic resource management systems. (p. 5). At the time of ESU's migration to WMS, the library dean was future-minded. He was looking for ways to support the new ILS developments that were being discussed, which ultimately led him to push for the migration to OCLC WMS. Additionally, during this period the library was starting to look more at eBooks and other electronic resources for collection development purposes instead of the traditional print resources. The new integrated library systems being developed were cloud-based and not tied down by legacy software to support. The move to OCLC WMS allowed us to streamline the cataloging and discovery of the library collection into one ILS. Previously, the William Allen White Library had adopted the WorldCat Discovery layer to increase access to materials, which ultimately put the library a step ahead in the migration process. Additionally, at this time the library moved from the self-hosted Millennium Web Access Management proxy to using a hosted EZ-Proxy, for authenticating users, which is managed by OCLC. By moving multiple library services under the OCLC umbrella, we were able to better integrate our processes into one ILS and maximize our efficiency.

Another large consideration at the time of the first migration was decreases in library staffing from approximately 2008 to 2013. The library staff had decreased by 25%, including two positions in the technical services department. Additionally, at that time we relied heavily on student workers to handle the day-to-day tasks, but the technical services student budget was reduced by almost 50%.

The migration from OCLC WMS back to Innovative Interfaces, Inc., Sierra ILS, was driven largely by the arrival of a new Library Dean, in fall of 2016. This change in leadership brought a different vision for the library one equally focused on the future with an emphasis on data. Also, prior to when we migrated from III Millennium the vendor had been building their own cloud-based ILS, Sierra and developing new products in order to create their own next-generation integrated library system.

These new developments to the ILS by the vendor made it worth reviewing the current functionality. From my experience as the ILS administrator for both systems, both offered unique strengths.

In the case of III Sierra system, one of the strengths is reporting. The Create Lists functionality as well as backend access to system tables provides unparalleled reporting, in my experience. Additionally, III Sierra developed new products such as a more robust electronic resource management system and their Decision Center tool.

The strength of OCLC WMS, is the web-based interface that functioned very well from the start. The integration of resources was very easy compared to our experience in the past. In WMS, you can check a box and “through indexing work done by OCLC” the contents of an entire collection are discoverable. Also, during our time on WMS, OCLC’s service included the setup of on-going data connections. This process was very efficient. A good example of this would be automating the updating of our holdings. Initially, we utilized the discovery layer offered by OCLC that was integrated with our holdings but we transitioned to the Ebsco Discovery Service(EDS). I submitted a ticket for the change in discovery layers and OCLC and Ebsco staff worked in a timely fashion to create seamless updating of library resources in the new discovery interface.

Migration Experience One

The migration to OCLC WMS began in mid-year 2013 with the eventual go-live date of January 2014. The process included a cohort model with four libraries from a variety of integrated library systems with total migration time of five to six months. Implementation specialists from OCLC facilitated weekly calls with the cohort. The library migration team leaders navigated the various checkpoints and milestones of the migration together as a cohort. Additional support outside the cohort existed on an implementation portal, which included community boards and various other resources including documentation from past implementations. Overall this process was very smooth.

Two factors contributed to the overall smooth migration to OCLC WMS. The first factor was the use of the WorldCat Discovery layer that ESU had begun using a year prior the implementation while still on III Millennium. This allowed for our library to be three weeks ahead on the implementation schedule for the migration to WMS since our discovery layer was already configured with holdings information. A discovery layer is software that “sits” on top of the traditional online catalog that tend to have enhanced searching features and content. We were able to spend this time on other issues related to the migration and to offer support to our cohort members. The second factor was the ability to get our records out of III Millennium. After the decades-long relationship with III, both the vendor and ESU Library administrator were familiar with exporting records out of Millennium and the various challenges that could occur.

Migration Experience Two

The second migration from OCLC WMS to III Sierra began in the fall of 2017 and completed in summer 2018. Initially the plan was to go live in January of 2018 but due to delays the typical six-month process took closer to nine months. This process was one-on-one with the vendor and included weekly calls and the use of the Basecamp project management software. Several factors during the process helped and complicated the migration. The most helpful factor during this migration was the on-site training. This helped us get more comfortable with staff at III and helped allay some anxiety during the migration. A review of literature in the area of ILS migrations found that other libraries recommended on-site or “premium migration package” training for those considering migration (Amato & Arb, 2018). The library decided to purchase additional on-site days to help with the migration.

The III Sierra ILS does offer the Encore discovery layer but the decision was made to stay with the Ebsco Discovery Service, as we had customized the user interface with features relevant to our library. The discovery layer is the primary way students are taught to access library resources any major changes during the middle of the semester could negatively impact our students ability to locate library resources. During the migration, issues with connecting the discovery layer to the new Sierra database caused a 4-week delay. In the first migration from Millennium to WMS, the discovery layer, WorldCat Discovery, became an asset and saved us time in the migration process since it was already part of the OCLC suite of products and was already configured. During our second migration the configuration of the Ebsco Discovery Layer with the III Sierra database required a complete re-configuration as the vendors were different.

The factor that caused major issues during the migration was being able to extract our records from OCLC. OCLC WMS is a newer cloud-based ILS that uses a metadata storage system to store information instead of the traditional MARC records. Although this new ILS worked great while we were with them, it may have created the issue we had with getting our complete accurate data out of OCLC WMS. In the end the data extracted was in bad shape. There were items with incorrect locations.

Bibliographic records with copies in more than one physical location lost the separate locations after the data extraction. Records ended up containing subject headings from the master record that were not a part of the original records and often times in a foreign language. These issues were caused by our inability to get accurate records out of OCLC after working with several staff.

On the III Sierra side, one of the issues experienced was working with server administrators that had been off-shored. There was a major time differential in being able to address issues as they arose. This change in time zones would cause a one- or-two day delay in getting issues resolved.

Another challenge the ESU Library faced during the second migration was the retirement of two staff members with over 50 years of experience in libraries and with III. The first person to retire was our cataloger who had 40 years of experience; much of that was in the III Millennium ILS. She retired six months before we began the migration. As a consequence, we did not have a cataloger on staff through the migration, which created a great lack of knowledge and complicated the process. The business manager for the library also retired during the migration to Innovative Sierra. In our workflow the library business manager was basically our acquisitions person. This position did all of the ordering and invoicing in III Millennium. She was available to start the migration but retired midway through the process.

Recommendations

Based on the experience of the two migrations the following is a list of recommendations.

- Resistance To Change- The focus of this is library staff. Keep in mind that this is a major change for your staff and will cause a lot of anxiety. Some staff will resist moving to the new integrated library system. The new ILS will likely cause change in workflows that will affect staff. Spend time building staff buy-in for the migration.
- Plan For Delays- Even the most detailed migration plan will encounter delays. This could be caused by implementation staff or any of the various vendors that are involved. The typical migration period is five to six months (Yang & Venable, 2018; D'Amato & Erb, 2018). Build in a two to four-week cushion of time for delays so that you are prepared when setbacks occur.
- Implementation Team- Build an implementation team that includes staff representation from each department or library workflow. Also, be sure to include your college's IT department as they will most likely be involved in the project at some point. Having the key people in place to help with configuration, documentation, and reviewing data will help make the migration process smooth.
- Vendors- Prior to the migration, put together a list of vendors that will be impacted. A six-month window or as soon as possible start contacting vendors to make them aware of the migration. Integrated library systems are becoming increasingly integrated with automatic updates that still need to be initially configured so, this list could include book vendors, journal publishers, electronic resource management, discovery layers, etc.
- Migration Timing- My recommendation would be for an implementation start time in January with a go-live date of May or June. Things to consider are the bill cycle not only for your ILS but for your various vendors as well that may be impacted. Having the migration end during the summer gives you time to deal with any potential changes before school begins in the fall. Because the migration period tends to be five to six-months, starting in the fall would mean going live mid-semester, which could cause challenges for students.

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