

**LITA National Forum – Houston, Texas October 11-13, 2002**

**Title: Half Full, Half Empty, Or All Over The Floor: Survive System Migrations and Get the Most Out of Your New Software.**

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## **LITA National Forum – Houston, Texas October 11-13, 2002**

### **Title: Half Full, Half Empty, Or All Over The Floor: Survive System Migrations and Get the Most Out of Your New Software.**

**Abstract:** Over the next ten years, many, if not a majority, of libraries in the US will go through a library system migration of some sort. For some, it might be a transition from one vendor to another. For others, it might be a new system brought on by the acquisition of their existing vendor in the consolidation of the Library Systems marketplace. And for others still, it will be a transition from a text-based interface to a graphical one. While many view system migration as a torment or trial of wills, the process need not be as painful as one might think. With the proper planning, adequate time, and an understanding of what to expect during the implementation, the library will be able to get through the process. Furthermore, one can use the implementation of the new system as an opportunity to revisit the entire workflow of the library and improve services to library patrons.

In this presentation, I will discuss two basic aspects of the system migration to not only make the transition smoother for the library, but also to set the framework to allow libraries to get more out of the transition to the new system. First, I will discuss the elements of system migration and offer the basic parameters and suggestions to ensure a smooth transition to the new system. This would be presented with both examples from my tenure as a training consultant and the implementations I managed for libraries before and after working for Innovative Interfaces. Second, I would like to examine the opportunities that exist during implementation to reevaluate workflow in the library workplace. This portion of the presentation will draw upon work I am preparing for an article on this subject for Computers in Libraries (July/August 2002 issue).

#### **Basic Outline of the Presentation**

- I. Introduction
  - a. Likelihood of a system migration
  - b. Background as a trainer
  - c. Implementation Process from the library side and the vendor side.
- II. Surviving Implementation
  - a. Establishing a workable schedule
  - b. Who should be directing the initiative
  - c. Training - who to involve & how to utilize extra training
  - d. How to move people into using the new software & establishing comfort for the new system.
  - e. What to expect/ask from your Implementation team.
  - f. Other issues.

- III. Re-evaluating Workflow with the new system
  - a. Establish team to review workflow & policies
  - b. Review the existing workflow & policies; determine which aspects you would like to change and or elements that are no longer practical or were guided by limitations in the software that you are migrating from.
  - c. Attend training & work with trainer to evaluate best ways to work with software.
  - d. Explore options during implementation to improve workflow.
  - e. Review new workflow solutions and provide training for rest of the staff.
- IV. Conclusion

**Level indicator: Intermediate**

**Biographical Information for Corey Seeman**

Since, May 2001, I have been the Assistant Dean for Library Systems at the University of Toledo in Ohio. I am responsible for all computer/system related issues at the University including the current implementation of Innovative Interfaces's Millennium client software for their INNOPAC system. Previously, I served for over two years as a library training consultant for Innovative Interfaces, working with over 15 libraries directly on system migrations from a variety of systems (including DRA, Dynix, Voyager, GEAC, etc.) to INNOPAC. As library training consultant, I served as the primary on-site contact with the company, trained the staff on the use of the system, and worked closely with the libraries after they "went live" after the early stages of implementation.

Prior to that position, I held department head positions in technical services and archival processing at the Historical Society of Western Pennsylvania (Pittsburgh, PA), and the National Baseball Hall of Fame Library (Cooperstown, NY). I have presented numerous papers at conferences including: Midwest Archives Conference, Society of American Archivists, American Association of Museums, national & regional Popular Culture Associations, and North American Society for Sport History. For a full list of articles and presentations, please see: <http://www.cl.utoledo.edu/userhomes/cseeman/cseeman.html>

***HALF FULL, Half Empty,  
Or All Over The Floor***

**Survive System Migrations and Get  
the Most Out of Your New Software**

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**Likelihood of a System  
migration**

- Most libraries are already running an automated system of some type.
- Lifecycle of an existing system
- Leaving a custom programmed system
- Mergers in Library Automation Sector
- Move from text or older system to graphical one

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**Personal Background**

- Implemented new systems for:
  - Historical Society of Western Penn.
  - National Baseball Hall of Fame Library
- Served as Training Consultant for Innovative Interfaces
- Implemented Millennium upgrade at University of Toledo

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## Library Training Consultant

- With Innovative Interfaces, Inc.:
- Primary Trainer for:
  - Public Libraries (6 libraries)
  - Consortium (2 systems)
  - Academic Libraries (5 libraries)
- Millennium System Trainer

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## Implementation Team App.

- Implementation Manager
- Implementation Consultant (Data)
- Technical Consultant (Hardware)
- Implementation Specialist (Software)
- Training Consultant (Training and use issues)

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## Surviving Implementation

- *Scheduling*
- *Directing*
- *Communicating*
  - *Training*
  - *Migrating*
  - *Assessing*
- *NOTE: This is AFTER the Planning, Testing, Visiting, Viewing, Negotiating, & Signing!*

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## *Scheduling*

- DO NOT RUSH THE PROCESS (*even if you are paying two contracts*)
- Avoid “New Building” or renovation deadlines
- Build in enough time to review data migration & train staff
- Listen to the company schedule
- Do not try to be 100% for day one.

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## *Directing*

- Cataloger or Head of Technical Services are the “Usual Suspects”
- Skills:
  - Communication with different departments
  - Liaison with Institutional Info. Technology
  - Ambassador for the system
  - Facilitator for the system between different departments

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## *Communicating*

- Critical Component of Implementation
- Communicate with Staff
- Communicate with Administration
- Communicate with Public

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## *Training*

- Paid vs. Internal
- Benefits of Paid Extra Training:
  - Done by professionals who know system.
  - Frees system admin from having to worry about staff training.
- Downside:
  - No one internally has experience training subsequent employees
  - Potential Disconnect with internal issues
  - Potential Disconnect with follow-up

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## *Migrating*

- Two types: Data and Work
- Data Issues
  - How is the data coded?
  - Will it do what you want it to do?
  - Can you change it yourself?
  - Is all the data there?

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## *Migrating – Work Issues*

- Work Issues
  - How is staff using the system?
  - Are they relying on the old system?
  - Are they relying on paper/backup system?
  - Have they created workarounds to create a similar system to the old one?
  - Have they revisited policies and workflow?

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## *Migrating – Work Issues*

- Review Existing Workflow
  - Identify components driven by old system
  - Identify components that you would like to get rid of
  - Identify services that you would like to offer
  - Identify “inertia-based” workflow patterns

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## *Migrating – Work Issues*

- Review Existing Workflow
  - Look at every paper form.
  - Follow items through the system (acquisitions, transfers between branches, etc.)
  - Ask WHY?????? (Not as an ass, but out of curiosity).

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## *Migrating – Work Issues*

- Look at new system
  - Use your implementation team & user groups to find out best practices.
  - Look beyond your current use of automation systems (“Invisible Fences”)
  - Never accept “it’s too hard to setup” or “it won’t work”.
  - Be flexible. “Don’t get attached to the results.”
  - Place the focus on customer service “WWJcpD?”

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## *Assessing*

- Periodic Event, not one-time
- Create review meetings with departments to assess systems & workflows.
- Mayor Koch Approach “How are we doing?”
- Survey the public

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#### Additional Readings and Resources on Library Systems Migrations and Library Automation.

*Note: I have decided to focus on North American Library migrations. A great deal of the literature on basic automation issues and systems migrations focus on other parts of the world.*

Agnew, Grace and Toni Lambert. *Online System Migration Guide*. Chicago, IL: Library and Information Technology Association & American Library Association, 1996.

Balas, Janet L. "Automation, the Second Time Around." *Computers in Libraries*, March 2002, p. 56-58.

Banerjee, Klye and Cheryl Middleton. "Successful Fast Track Implementation of a New Library System." *Technical Services Quarterly*, vol. 18, no 3 (2001), p. 21-33.

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<http://www.biblio-tech.com>

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*Note: Library Journal has an annual issue covering the Library Systems marketplace and it is typically found in the April 1 issue. While this often covers the sales of new systems, it does provide a great deal of information on the state of the marketplace and automation issues that arise.*

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Day, Elaine Lois. "Management issues in selection, development, and implementation of integrated or linked systems for academic libraries." *Advances in library administration and organization*, vol. 8, 1989, p. 69-111.

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Nicholas, Margareta. "What Is, Where Is the Horizon?: Technology Planning and Budgeting as Part of the ILMS Replacement Process."

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Ralson, Rick and Margaret Rioux. "With Feet Planted Firmly in Mid-air: Staff Training for Automation System Migration." *Serials Librarian* vol 36, no 3/4 (1999), p. 407-413.

Saffady, William. *Introduction to Automation for Librarians, 4<sup>th</sup> ed.* Chicago, IL: American Library Association, 1999.

Schappert, Catherine H., "The library automation project: is it ever really done?." in *Insider's Guide to Library Automation: essays of practical experience.* Westport, CT: Greenwood Press, 1993.

Seeman, Corey. "Invisible fences: a shocking theory for re-examining work flow," *Computers in Libraries*, July/Aug 2002, p. 24-30 (Copy of article included in this handout).

Vaughan, Jason. "Preparing for Technology: Systems Planning and Implementation in Lied Library." *Library Hi Tech*, vol. 20, no 1 (2002), p. 33-46.