TSMALIG: System Migration Discussion
ALA 2023 Chicago June 23. 2023
Discussion Leader:
Mary S. Konkel
Head of Technical Services
College of DuPage Library
konkel@cod.edu

From Mary's Perspective….

4 Phases of Systems Migration

1. Pre-migration
2. Migration
3. Post-migration
4. Post post post post post migration

Pre-migration

- Set up contacts ; have a main staff contact and backup ; vendor generally requests a single contact for consistent communication; who will be your institution's representative?
- Find out who will be your primary vendor contact; build that relationship
- Assemble an in-house team with representatives from functional areas: cataloging, acquisitions, circulation, InterLibrary Loan; systems/Web, public services/references; if IT is involved with library software, it would be helpful to also include a representative on team
- Look for prior system migration and mapping documents if you've previously migrated; check with veteran staff; check with current vendor who may have copies
- Document along the way, including forms and notes, backup electronically
- Include appropriate staff in data mapping, review, and testing; don't just keep it in steering committee
- If you are planning or are able to run both systems in tandem for a bit after actual migration, it may be helpful to reference a bib ID or other "hook" from your current system to assist in testing
- Clean up data you don't need to migrate > review your locations, fund codes, patrons; are there collections no longer around, patrons (faculty, staff, students, etc.) no longer with institution, old order records, bibs without holdings or items since withdrawn; records hanging around for old equipment, short record created for on-the-fly circulation or InterLibrary Loan transactions … LET THEM GO
- Loan rule mapping (how long does something in X location circulate for) is critical and may not translate exactly the way it does in your old system
- Training is key and breaking it down by functional units works well
  - Use vendor training Welcome - Alma - LibGuides at Ex Libris
  - Use other libraries documentation; i.e. Harvard Wiki Alma - Library Technology Services: Staff Documentation Center - Harvard Wiki; SUNY Getting Started - Alma &

[Primo VE Training - Guides at SUNY Office of Library and Information Services (libguides.com)](); If you are in a consortia, usually they will have training information: [I-Share Documentation | CARLI (illinois.edu)]()

- Site visits are extremely important; visiting another library already migrated, borrowing their documentation, talking to counterparts
- Electronic resources may have a new setup and/or be more challenging i.e. in Alma, electronic resources do not have holdings or items, they have portfolios
- When your vendor delivers your TEST database, it's all hands on deck; find examples in all locations, checkout periods, multiple formats—especially nonprint and electronic resources to search for; check serials holdings, check OCLC downloading profile, test print (often a pain point)
- There will be down time after your TEST database is delivered, so no adding or deleting anything; have staff projects lined up; use OCLC save file, do collection inventory, repair—offline projects

DISCUSSIONS:

- Cultivating vendor relationship was key for those who had experience in migrating; vendor as your "bestie" assisted in accelerating troubleshooting, making connections with other libraries using their system, assisting with documentation and forms
- Having a steering committee in house greatly assisted in migration preparation and communication in all library areas; great learning opportunity as functional units and workflows cross
- Super important to have mapping and loan rules reviewed by those who do the work
- Site visits were very insightful and reviewing other libraries' mapping forms and documents lessened the burden and helped understanding and made tasks less daunting
- Sometimes just using Google to search for a particular "how-to" like "how do I check in a periodical issue in Alma" or "how do I create a new fund or vendor in Alma" gets you to the specific step-by-step process quicker
- In pre-migration cleanup, focus on the things that matter like not migrating bib or order records or patron records you no longer need; save the bib record cataloging updates for later projects i.e.. GMD cleanup, authority work

Migration

1. Once migration occurs, start slow and use the same testing examples and staff used in TEST database to make sure that data migrated as planned; helps to have that consistent feedback
2. Test functional activities in real time and in small steps > create orders, catalog, check in periodicals, check-in/checkout items, print records and receipts
3. Have someone double check any issue or concern; share with steering committee; then log (just like you'd do with a construction punch list) and forward to you vendor "bestie"

4. During this time, pay special attention to staff morale and those who may be slower to change; have multiple modalities of training> print, electronic, in person or pairs
5. Learn to embrace the system as your new tool but acknowledge pain points and advertise the new efficiencies; group work and sharing works well; we are all in the “same boat” training and learning something new

DISCUSSIONS:

- The show-me, side by side group training may work well in the same functional units; if you learn something new or “cool” share with the class
- Impossible to predict or cleanup everything in pre-migration, so document issues, go back to colleagues in other institutions from your site visits—very helpful
- As a manager, while you can silently “hate” specific features, don’t actively verbalize in front of staff; good to commiserate but be prepared with sharing new and helpful features or training that you may have run across
- Now’s the time to really examine your policies and procedures to make sure they align with new system and if in a consortium—what you need to do for the “good of the all”

Post migration

- Keep abreast of any scheduled updates to the system; share specific functional module updates with staff in those areas; review alerts and whether you can opt in or opt out; if you try a new feature and don’t like it, can you turn back off?
- Continue to cultivate relationship with vendor contact
- Document new procedures and policies; post where staff can access
- Keep statistics of database maintenance > you’ll be doing a ton of work and stats will tell a great story
- Maintain your main Library contact with vendor and steering committee, as appropriate; keep backup informed; steering committee charge may change—more systems-related work or informational meetings happening within functional units
- Identify a space for communication, FAQs > maybe a Library Intranet

DISCUSSIONS:

- If not already in place, create a ticketing system for problems to be acknowledged and make it easier to address > especially for public services/reference staff who will see the bib records rendering in the library catalog

Post post post post post migration

- Present at conferences and workshops—share your experience with future system migrators > maybe a publication?

- Attend meetings and conferences and visit your vendor’s booth; check out their website, especially training updates
- Watch for alerts and software updates and look to consortia, if you are in one, for additional guidance
- Do wellbeing checks with other functional units to see how you workflows are affecting each other
- Important to see how your institution is doing with regard to the Library’s new system; library liaisons might be great conduit since they interact with faculty on a regular basis; focus group or student satisfaction survey
- Check on you users; student workers are great sources of feedback
- Check in with others in your consortia or with other institutions that have migrated

DISCUSSIONS:

- Database maintenance is an on-going process and will definitely increase in workload with migration; helpful to invite others—not just technical services staff—to share the load, even student workers for some tasks