

Library Management Systems

The right route through migration

Changing your library management system is one of the biggest disruptions that your service will have to go through. **Debby Raven** asks those who have recently been through system migration about their experiences and what they have learnt.



DOES thinking about changing your LMS fill you with dread? Are you feeling frustrated at the prospect of more than a year of upheaval? And then there is the expense...

Well, the migration process isn't really that bad, as many librarians who have recently gone through it will tell you.

If you need convincing about changing your system, talk to as many people as you can. Jan Seaborne, Librarian at Dyslexia Action, migrating to Open Source system Koha, remarks 'how helpful librarians at the King's Fund and the Scottish Poetry Society were in telling me about their experience of using Koha'. Abby Barker, E-Resources Librarian at University Campus Suffolk, found visiting other libraries invaluable: 'Being able to see how a library actually uses the system is very different to seeing it demonstrated by a sales team'.

Others advise researching libraries in your sector, and taking advantage of the various systems' user groups.

Attending the CILIP LMS showcase (on 4 November, see www.cilip.org.uk/lms-showcase-autumn-2011/) to see most of the players all in one place (p. 16, this issue lists suppliers who'll be there) will also help you to make a decision.

Don't feel hampered by being tied into a contract. 'One reason people delay is because their existing system contract period has not yet expired,' says Graham Beastall, MD of Soutron. 'But any reputable supplier should be willing to accommodate your needs and allow you to begin to use a new system alongside your existing system.'

An invitation to tender document will help you to decide which system best meets your requirements. The United Kingdom Core Specification (UKCS) for LMSs, developed by Juliet Leeves (<http://libtechrfp.wikispaces.com/>) is a helpful practical guide; Hannah West, Knowledge Services Co-ordinator at the Chartered Insurance Institute, found it a 'huge help'. It is

available free of charge from the LibTechRFP 'Open Specifications' website.

If you're still apprehensive, then think about the benefits. Axiell says that 'a clean break can give a library service the opportunity to review business policies and strategies'. And many librarians said they found the process a good opportunity to analyse what they really wanted from a system.

'Changing LMS is a massive opportunity to improve the service offered to your users,' says Andrew Cheney, E-resources Librarian, Mersey Care Knowledge and Library Service. 'The catalogue represents the library online and as such can serve as a fantastic promotional tool for your service.'

For school librarian Marion Prickett, changing systems has significantly raised the library's profile, particularly with the school's IT committee. 'They have recently agreed I should be allowed a fourth – top spec – computer in the library,' she says.

Time and money

You may find the process quicker and smoother than expected. Feedback from librarians who have just gone through migration reveals the longest it took was one year and three months. In almost all cases LMS suppliers met timescales. Helen Pye-Smith, Head of Business Support & Library Services at The National Archives, moved from Unicorn to Koha. 'The process proved to be far less daunting and time-consuming than I imagined,' she says.

When it does take longer than expected there is usually a good reason, often related to data migration, a major part of the process. Hannah West, who moved from Unicorn to SoutronSolo, says: 'It did take much longer than we thought, namely due to the "dirty data" on our existing system – this is a common issue when changing LMSs. But it was worth having a really good spring clean while we had the chance.'

Catherine O'Sullivan, Information Resources Manager at St Mary's University College, Twickenham,

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says that sometimes sales people will agree to your migration schedule before consulting the migration team: 'If you need to go live on a certain date, set it out clearly,' she warns.

From the supplier's perspective, Penny Bailey of Bailey Solutions says that she has experienced delays from clients due to having to get legal documents signed off, lack of IT staff resources, and staff workloads preventing sufficient time being allocated to the job.

The cost of migrating to a new system may initially seem daunting. However, Penny points out that overall costs are likely to come down because modern systems are not so labour intensive. And, as libraries are moving from print resources to electronic, they may not need such a complex system.

Neil Waterhouse, National Information Services Assistant Manager at Baker Tilly Management Limited, used a formal invitation to tender to get initial costings from several potential suppliers. 'These figures formed the basis of our business case and demonstrated that over five years the overall cost of changing systems would be almost zero.'

Abby Barker recommends having a contingency budget for unexpected items, '...in our case the VLE "widget" for Blackboard. We use Open Athens Single Sign On for authentication, and we are the first Heritage customers to do this, and this work has cost a small amount of money'.

Josie Crimp, Librarian at Shrewsbury International School in Thailand, says that even though annual costs are higher, 'we get so much more value from the new LMS (Destiny, from US company Follett) that I think this has been worthwhile'.

Help!

Good support, guidance and training from suppliers is an essential part of a deal. As part of its package, for example, Axiell offers 'data migration skills, training and technical/networking services'. Andrew Cheney notes that the good support he gets from Soutron is crucial '...as it encourages the librarian to really understand the inner workings of the system – you're empowered knowing that when trying something new help is only a phone call away'.

Hannah West liked the fact that her Soutron project manager was available via conference call, Skype, or email, for any further queries following training. Soutron's Graham Beastall says: 'Once the system has bedded in, we return to see how it is being used in practice.' Neil Waterhouse also appreciated the time that Bailey Solutions took '...to understand how we worked and how their system could fit into our processes'.

Dan Holmes of Infor says that although many libraries worry about the migration, 'they often don't know "how" to worry about it. They are not clear how to ask the right questions.' So he has developed a hefty 100-page 'Method Statement' which outlines in detail Infor's approach to issues raised by the implementation process.

It also pays to be precise about what you want from training. Catherine O'Sullivan says sometimes it 'was showing us what the system could do but what we wouldn't want it to do.' And Infor's Dan Holmes says make sure to send the right people – someone who, once trained, is going to be able to train others: 'Our general approach to training is "train the trainer".'

With Open Source systems, clients have the freedom to move between support providers if they are not happy with them. Nick Dimant, MD of PTFS Europe, a support company for Koha and Evergreen, says several customers have moved to PTFS from other companies: 'With Open Source the immutable link between vendor and product is severed'.

Everyone on board

Getting everybody on board and keeping them informed is crucial. 'The more you communicate the easier you will find the whole process', says Abby Barker. 'I held a weekly meeting to update our staff, also useful for feedback.'

And, although a hosted system may free you from your organisation's IT department, you will need their help during migration. 'Establishing a strong relationship with the Head of IT is key,' says Piers Cain, Head of Knowledge Management at the Chartered Management Institute. 'Inevitably, in a major IT project, there will be problems and there will be a crisis. How you handle the crisis and the relationships will determine whether the project will succeed.' Abby Barker invited a member of IT staff to the initial demonstration '...as they could ask the technical questions that we would never have thought of'.

Neil Waterhouse says: 'IT was involved in the initial consultation, drawing up the Invitation to Tender, and trials'. He also drew up a communications plan that detailed who needed to be told what and when, including the users. Helen Pye-Smith used a Regular Users Forum to highlight the changeover both before and after it happened. 'We also provided "drop-in" training sessions for The National Archives staff so they could come and find out about the new system before it went live,' she says.

Abby Barker adds: 'We publicised the new system six weeks beforehand with posters, notices on the VLE, weekly direct emails from the library and mentions in the weekly student union email newsletter'.

From the start, take care in your communications with your supplier. Andrew Jones, Resources Co-ordinator, National STEM Centre, says: 'Make sure that you are very clear in your specifications to your vendor – for example we asked for a self-issue facility (meaning both issue and return) and got just issue'.

The Method Statement for Infor clients covers 'what we do and how, and what we expect the library to do', says Dan Holmes.

Capita (formerly Talis) provides a tailored reporting structure 'so that any issues and general progress updates can be shared transparently with the project board and any other stakeholders,' says Karen Reece, Head of Sales and Support, Library Services.

In the absence of a formal structure, 'emailing a million pernickety questions', to your supplier works well, says Josie Crump. And keeping detailed records, including emails, helped her sort out a discrepancy that meant she was being asked to pay for something extra. 'Another reason why the nitpicking beforehand is really, really worthwhile!'

Learning from mistakes

There are bound to be glitches in such a major project as system migration. But Abby Barker found that sometimes simple problems 'provided an opportunity