Westchester Library System Integrated Library System Migration Review, May 2019

SirsiDynix and Symphony to Equinox and Evergreen

Presented By
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How we got here

- Request For Proposals (RFP) Process & Scoring

- SirsiDynix version change expected

- Integrated Library System (ILS) Presentations at Public Library Directors Association (PLDA)

- PLDA Vote

ILS Comparison

- Open Source - What does that mean to the system

- Sirsi vs Evergreen

- Evergreen Strengths

- Evergreen Weaknesses

- Staff workflow changes

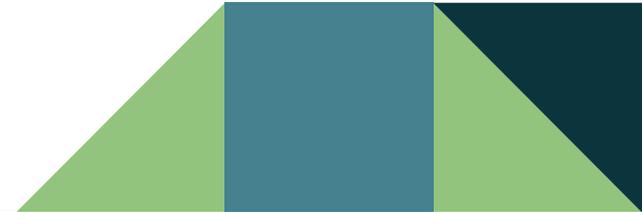# Migration Process

Staff Preparation

- Library designated TechXperts

- Training at WLS and at branches to reach as many staff members as possible

- Provide access to online instructions, tutorials and demos

Migration Process

Migration Committee Established

- Determine efficient communication methods

- Develop weekly newsletter

- Discuss data preparation for transfer

Migration Process

Preparing the Public

- WLS provided templates for informing the public (both paper and electronic)

- Staff were encouraged to let patrons know verbally

Migration Process

The Big Day

- Offline dates were determined months in advance

- Staff were prepared for offline procedures for a three-day period

- At the beginning of the fourth day, Evergreen was operational in every Library (Right on schedule)

Patron Response

- Holds migration issues, mostly resolved or being addressed

- Ongoing patron education about Holds and Account logins

- Account history and lists

- Improved search

- Varying opinions about style

Migration Follow-up

- All IT personnel engaged in troubleshooting, resolving issues and addressing change

- Updates at least weekly to keep libraries informed about system adjustments

- Establishing new workflows and best practices

- Transition from migration to vendor support system

Moving Forward

Creation of the ILS Committee

- A panel of knowledgeable library staff who frequently utilize the system

- Work alongside WLS staff to address any concerns, issues, and suggestions to enhance the system

- Establish a forum that will direct all Evergreen related staff inquiries into one place

Moving Forward

Continuing Education

- Weekly features, tips, and best practices

- Monthly Evergreen newsletters

- Refresher and enhanced training for TechXperts and specific topics

- At WLS, regional locations, individual libraries, remote one-to-one sessions

- On demand Quick Start guides and video helps

Moving Forward

Adopting Best Practices

- Establishing workflows with library input

- Communicating with TechXperts, the ILS Committee, and library staff

- Making more information available

- Utilizing the system to its full capacity

- Establishing relationships with comparable systems

Credits

Created by

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  Croton Free Library Director, PLDA ILS Committee Chairman

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