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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