



EVERGREEN  
INDIANA™  
OPEN SOURCE INTEGRATED LIBRARY SYSTEM

Ensuring A Successful Migration

# Migration?

- What is a migration?

# What Migrates?

- Bibliographic Records
- Holding Records
- Patron Records
- Transactional Data
  - Fines/fees
  - Holds
  - Circulations

# Migration Timeline

- Timeline of a migration
  - Prepare mapping and OPAC Config
  - Test load of records
  - Freeze on catalog and patron records
  - Final extraction of patron record and items

# Evergreen Indiana Expenses

- Covered by State Library
  - Migration costs
    - Generally between \$4000 & \$8000
    - Bibliographic records
    - Patron records
  - New library cards
  - Rebarcoding –where necessary



# Evergreen Indiana Expenses

- Covered by migrating library
  - Data extraction
  - In some instances, migration of transactional data
  - Hardware maintenance



# Ensuring A Successful Migration

- Preparation
  - Prepare Staff
    - Staff Training Documents
      - <http://www.in.gov/library/3380.htm>
  - Prepare Patrons
    - Resources for Member Libraries
      - <http://www.in.gov/library/3379.htm>
    - Press Release Examples
      - <http://www.in.gov/library/3378.htm>
  - Prepare Data
  - Prepare Current ILS Vendor



# Preparing for Migration

- Clean up Bad Data
  - Patron records
    - Delete Inactive and Duplicate Cards
    - Update Patron Account Information
      - Current addresses and full names
      - Add email addresses and phone numbers
    - Reciprocal Borrowers
  - Bibliographic records
    - Delete records associated with lost items
    - Clean up “patron” helpers





# Preparing for Migration

- Understand your current ILS
  - Where is your data stored?
  - How data is stored?
- Familiarize yourself with how to do the extractions
  - Seek help from vendor
    - Timing Issue
    - Costs

# Understand your current obligations

- Review current ILS contract
  - Termination provisions
  - Notice obligations
  - Post-termination obligations
  - Data extraction assistance
  - Access to data post-migration
    - Annual report statistics

# What is mapping?

- OPAC Config
  - Hours, locations
  - Email for notices
- Spreadsheets
  - Patrons
  - Items
  - Circulation Modifiers

# Migration Success

- Clean Up Patron & Bibliographic Records
- Download the demo
- Review the policies and procedures
  - Develop workflows & procedures at the local level
- Visit other libraries
- Join the list serves
- Use the resources available on the Evergreen website

» <http://www.in.gov/library/evergreen.htm>





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Catherine A. Lemmer, Project Manager  
Indiana State Library  
Library Development Office  
317.234.6536  
[clemmer@library.in.gov](mailto:clemmer@library.in.gov)