

ALL HANDS ON DECK

A Team Approach to System Migration

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PURPOSE

To determine if a team approach to a complex integrated library system (ILS) migration would result in a timely and successful outcome.

BRIEF DESCRIPTION

Changing needs and an aging integrated library system server platform prompted Himmelfarb Health Sciences Library to migrate to a new ILS. After considering several options, Himmelfarb decided to join with the George Washington University's Jacob Burns Law Library in their move to a hosted instance of Innovative Interface's Sierra ILS and Encore OPAC.

Though some separation of data and functionality could be achieved, there were several functions that would be shared between the two libraries' systems. A successful transition would depend upon both libraries':

- detailed knowledge of the system data
- determining essential functionality to preserve
- willingness to change and accommodate

Because the Law Library's Sierra migration was delayed until mid-December 2012 and Himmelfarb's pre-paid server maintenance was ending in March 2013, the window to accomplish migration was a short 12 weeks, prompting the decision to team-manage the migration.

METHODS

ORGANIZATION OF TEAMS

Eight teams were formed, each made up of three to five staff members and a designated team leader. Each team was responsible for migration planning and accomplishing assigned tasks, as well as documenting new workflows and procedures.

ORGANIZATIONAL TOOLS

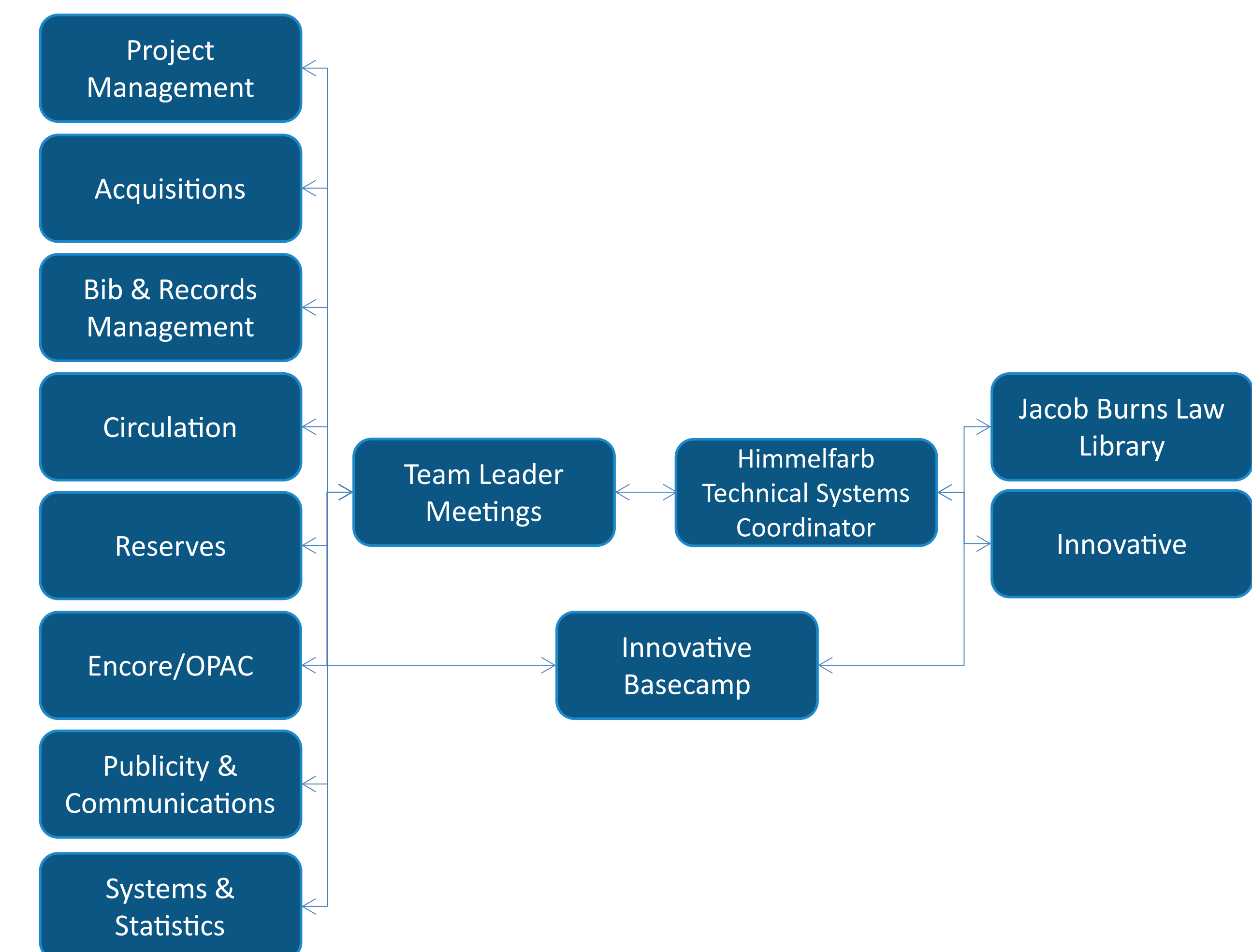
- Construction of timelines
- Weekly meetings of team leaders to review systematically past assignments and receive tasks for upcoming week
- Weekly meetings with Burns/Himmelfarb project leaders and the Innovative project manager
- Publication of meeting minutes to a shared drive
- Assignment completion tracked with spreadsheets
- Relationships forged with key staff members at Jacob Burns Law Library
- "Basecamp" project management website used by library and Innovative staff to work through migration issues and questions

METHODS (CONTINUED)

TEAMS	TASKS
Project Management	<ul style="list-style-type: none"> • Create timelines & assign tasks • Schedule meetings & record meeting proceedings • Ensure accountability among all teams
Acquisitions	<ul style="list-style-type: none"> • Create fund and vendor records • Test acquisitions and fund management functions • Create new print acquisitions workflows
Bibliographic & Record Migration	<ul style="list-style-type: none"> • Export & format bibliographic/item/authority records for upload • Test bibliographic and authorities functions • Create cataloging, authority, and serials item management workflows
Circulation	<ul style="list-style-type: none"> • Determine new structure for user records • Reconstruct circulation and holds rules/maps • Manually migrate checkout records • Export and reformat user records for upload • Create new circulation workflows (e.g., overdue & bill notices, missing & long overdue items handling)
Reserves	<ul style="list-style-type: none"> • Recreate course, reserve, and instructor records • Create new reserves workflows
Encore/OPAC	<ul style="list-style-type: none"> • Research catalog options (Encore & WebPac) and document their advantages/disadvantages • Determine record display including searching defaults and form configuration • Set up design, branding, and links to external tools and resources • Test functionality and usability • Integrate OPAC links into library website
Publicity & Communications	<ul style="list-style-type: none"> • Communicate timelines, events, and changes impacting service to library staff and users via the library website, blog, social media, listservs, and posted signs
Systems & Statistics	<ul style="list-style-type: none"> • Determine ongoing statistical reports to transfer to the new ILS • Create reporting structures in Sierra • Determine ongoing systems administration duties • Create staff logins and determine levels of access • Coordinate installation of client software on staff computers

COMMUNICATIONS FLOWCHART

Effective communication was essential to the timely completion of migration tasks. Team progress was communicated to the Himmelfarb Technical Systems Coordinator through weekly Team Leader Meetings. Communication also flowed from all team leaders to the Coordinator, Law Library project leaders, and the Innovative project team through the Basecamp project management website.



Some of the communications challenges included sorting through the high volume of email traffic generated on Basecamp, factoring in time zone differences between customer and vendor when working on time-critical issues, and balancing vendor and customer priorities.

CONCLUSION

Teams and organizational tools, including weekly meetings to discuss problems, ensured the timely completion of key assignments that were critical to meeting the Go Live date goal. The team approach allowed the work and decision-making to be distributed among a large percentage of the staff, creating a broader sense of ownership. Distribution of tasks allowed a high level of attention to detail necessary for an optimal outcome.

MIGRATION TIMELINE HIGHLIGHTS

