

# **OWLSnet Communication Plan for Migration to CARL**

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Migrating from one ILS platform is a complex project that affects every library and the communities they serve. Many decisions will need to be made as we set up our new ILS—many more than we can bring to AAC. We have over 1.5 million items, 700,000 bib records, and 238,000 patron records; and holding them all together are loan rules, statuses, transaction data, print templates, calendars, connected third-party databases and resources, and dozens of other factors to take into consideration. Our goal is to transfer 100% of the transferrable data and resources over to CARL. In order to do this by August 2020, we will need to make many decisions in an efficient, yet transparent manner. This plan will tell you how we will do that and how we will keep you up-to-date on our progress.

Our primary goal is to get all our data transferred over to CARL with a minimum amount of impact to current workflows. A migration will be disruptive, so we will try to keep old and new workflows as similar as we can. When possible, we will consult current policies, procedures, and practices, and directly reflect that in the new ILS. When options are not that direct, we will connect with field consultants in the libraries to inform our decisions. When decisions on a new workflow require more discussion and authority for a resolution, we will bring the problems or questions to AAC. Additionally, in order to track decisions, we will create a document listing the decisions that were made in this process as well as the options that were available. Later, if we choose, we can revisit these options.

A separate communication/marketing plan is in progress for patrons. We will keep you updated with progress on that plan.

## **Core Implementation Team**

Core Implementation Team: Amanda Lee, Molly Komp, Evan Bend, John Wisneski, Bradley Shipps, Beth Carpenter, Michael Nitz

The Core Implementation Team will use Microsoft Teams to communicate between meetings and keep track of documents and conversations.

Weekly meetings of the Core Implementation Team will take place on Wednesdays at 2 pm. These meetings are driven by OWLSnet with our project team at TLC. After each weekly meeting the Core Implementation Team will gather:

- Action Items
- Communication points to share with OWLSnet libraries
  - New features we're excited about
  - Weekly meeting updates

- Decisions we made
- Impacts we expect this will have on workflows
- Decisions made and options that were available
- Topics we want to revisit after migration

As decisions are made, we will keep a document with options we had and what we can come back to as well as a document with questions for TLC. Questions will be addressed at the weekly meetings and at appropriate design sessions.

## **Timeline**

1/7/2020 Kick Off

January/February 2020: TLC setting up servers and working with Dave on our network connections, begin bib data clean-up, begin preliminary work on patron record clean-up and identify patterns in patron notes

Late January/February/March: Design sessions

- Cataloging
- OPAC
- Serials and Acquisitions (February 17 and 19)
- Reports
- Circulation
- Third Party and SIP2
- Notices

March/April/May: Data testing, tweaking, and clean-up

June: Training plans and more data testing

June 23-July2: TLC onsite to train system and library staff

July: Library staff training

July/August: Final data testing

August 10, 2020: No more bib record changes in Sierra

August 14, 2020: OWLS will send final ILS transaction data to TLC after libraries close

August 15-16, 2020: No ILS available (Saturday and Sunday)

August 17, 2020: Go Live

## **Values Guiding the Decision-Making Process**

While making decisions on the design of the new ILS, the Core Implementation Team and OWLS will refer to the OWLS and OWLSnet Mission and Purpose Statements as well as incorporate the

work done by the Samarbeid Committee as reflected in the NOW Resource Sharing Policy. The following are those mission and purpose statements, values reflected in those documents, and the four questions we will ask ourselves as opportunities present themselves.

### **Mission & Purpose**

1. Facilitating resource sharing among network participants and
2. Increasing the efficiency and effectiveness of participant library operations and services
3. Encouraging innovation in services

### **Values**

- Patron Experience/Customer Service
- Flexibility
- Financial responsibility
- Cooperation
- Access
- Service
- Equity
- Collaboration
- Innovation
- Embrace change
- Complement and improve local library services
- Extensibility

### **Considerations**

- How does this impact patrons?
- How does this impact library staff?
- How does this impact resource sharing?
- How does this impact system staff/annual reports?

### **Library Involvement**

Field consultants, interested libraries, and subject matter experts will be invited to design sessions. Design sessions will take place on the following topics:

- Cataloging
- Acquisitions
- Circulation
- Serials
- OPAC

If the Core Implementation Team cannot make an informed decision based on current policies, procedures, and practices, or the functionality is new or vastly improved, we will call upon field

consultants in libraries. So far 3 people are lined up, Eva Kozerski (Black Creek), Joanne Finnell (Marinette County) and Mikki Moesch (Shawano County). Amanda will be in contact with a few other libraries to recruit participation. She hopes to get representation from OWLS and NFLS and a variety of library sizes and types.

If a clear solution does not present itself after going through the Core Implementation Team and the Field Consultants, issues will come to AAC for more direction.

Weekly updates will be posted for libraries using Office 365. We are currently investigating a few Microsoft communications tools. Email updates will also be available. OWLS will provide more information on how to join and use the group shortly. Any staff member in OWLSnet can join this group, so please let Amanda, Evan, or Liz know if you'd like to be added. We hope this format will allow for easier interaction with each other and allow for all information on this process to be in one place.

### **Expected Obstacles**

It's hard to anticipate what obstacles we'll have, but there are some to be expected.

We know that Sierra allows for messy bibliographic data. CARL Connect Discovery utilizes data in the cataloging records much more efficiently to provide more accurate facets and searching in the online catalog. This is exciting for catalogers but we know a lot of work will have to be done to clean up records.

Patron records have a lot of note fields in Sierra! We will have to find a way to parse some of that data out and identify if we should have additional user-defined fields based on what libraries are putting in note fields.

Acquisitions data is not standardized from one ILS to another, so order records and past invoices, purchase orders and other data will not migrate. Fund codes and vendor codes will be entered into CARL, but they will not be "transferred." We will have to work with acquisitions libraries to see how they want to handle this.

Some of our external databases will need to change the way they authenticate library patrons. We're in discussion with some of them now to see what other options we have.

Training will be another challenge. We are spread across a wide geographic area with diverse needs. Amanda and Bradley will immediately get to work on a training plan. Another large library consortium has already migrated to CARL, so we will consult with them when creating the plan.

Annual report data for 2020 will need to be pulled from two different ILS platforms.

Sierra transactional data isn't always easy to get to. Amanda is learning Python to help convert some of the other CARL libraries' scripts who have offered to help get this information.

## **Your Role**

Communication is a two-way street! We will do our best to conduct a transparent migration process. If you have questions or concerns along the way, please contact the Core Implementation Team.

Other things you can do:

- Weed! The less data we need to move the cleaner the new database will be from the start
- Consider forgiving fines or bills (same concept—we'll have less to move)
- Prepare patrons and staff for change. Share the exciting new things we expect to have access to
- Follow along with our process