

Moving to Evergreen

I wish I knew then what I know now!





Agenda

- ▣ Introductions
- ▣ Project Management
- ▣ Online Patron Access Catalog (OPAC)
- ▣ Training
- ▣ Burlington, La Conner & Upper Skagit Implementation
- ▣ Q & A



How we Came to Evergreen

Jed Moffitt
 jmoffitt@kcls.org
 Director of Information Technology Services



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Project Management

Matt Carlson
mcarlson@kcls.org
Integrated Library System Administrator



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www.unscheiden.com
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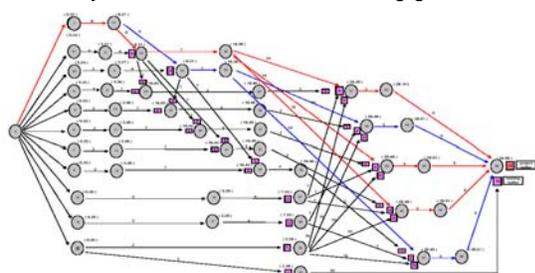
Project Management

- ▣ Project Charter
- ▣ Communication!
 - Weekly meetings with team
 - Weekly/daily conference calls with programmers
 - Periodic updates to staff

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Project Management

- ▣ Identify Critical Path Tasks for setting go live



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Project Management

- Data migration
 - Identifying stakeholders and understand data
- Subject Matter Experts involvement is vital.



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Evergreen Community

Participating in the Open Source Community

- Get Involved
- Track community updates
- Where to ask questions




Evergreen-ils.org

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Grant

- Institute of Museum and Library Services
- Leadership grant
 - Work with other libraries to help them do what we have done
 - Produce tools that others can use and lessons learned to ease the transition




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Online Patron Access Catalog

Lisa Hill
lhill@kcls.org
Web Services Manager

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Scoping and Planning

- Identify what you HAVE TO HAVE to go live
 - Usability information
 - Staff input
- Identify what your vendor needs
 - Version control
 - Get a plan in place so that upgrades and multiple developers don't overwrite their work

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Catalog by the Numbers (2011)

- 70.7 million visits
- 7.8 million visitors
- 80% of all visits to the catalog were from users not at our libraries.
- 22,000 visitors on an average day / 30,000 visitors in all of our libraries for the month of May.

User Type	Count
Overall Users	7.8 Million
External Users	6.2 Million
Internal Users	1.6 Million

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Two Vendors

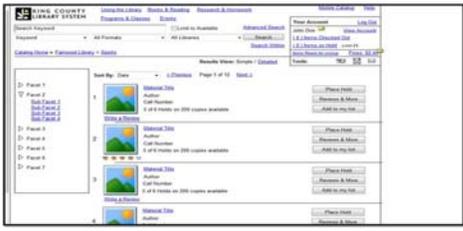
- **ESI -Equinox Software**
 - Developing OPAC underlying software changes and enhancements
- **FGI**
 - Developing web based User Interface for the KCLS customized OPAC



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Wireframes

- “just the facts”



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Pre-Evergreen Screen



Search The Catalog

SEARCH BY: Keyword FOR THESE WORDS: LIMIT TO: View ALL Formats and Libraries THEN CLICK: GO

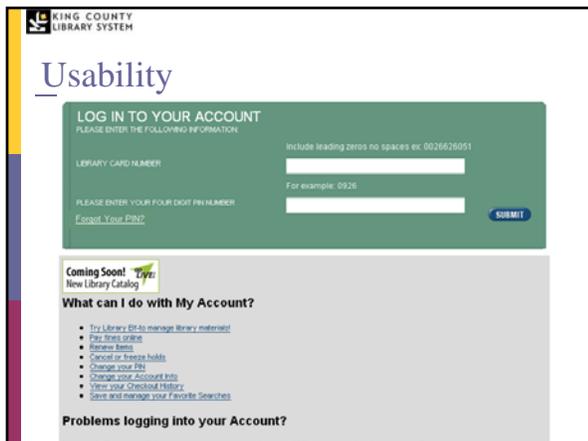
ASH: A LIBRARIAN | ADVANCED CATALOG SEARCH

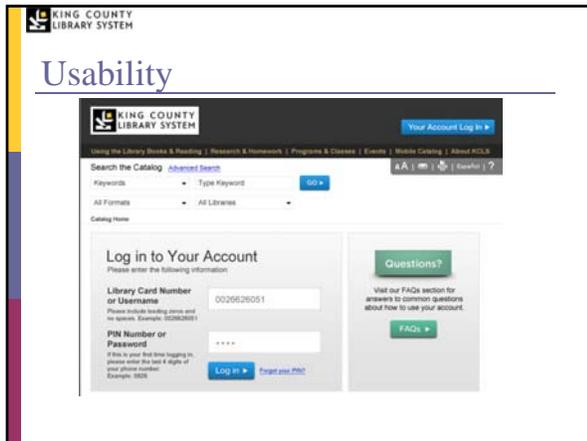
EXACT SEARCH	SEARCH BY WORDS	BROWSE BY
<ul style="list-style-type: none"> • AuthorName (Last Name, First Name) • Title begins with • Subject begins with • Magazine Title (English Only) • Author/Title • Call Number 	<ul style="list-style-type: none"> • Keyword (Author, Title, or Subject) • AuthorName Keywords • Title Keywords • Subject Keywords • Content/Notes/Summary • Publisher Keywords • Descriptive Keyword (near Fiction Attributes) 	<ul style="list-style-type: none"> • Fiction Books • NonFiction Books • Books on CD • Books on Cassette • Magazines • New Reads • eCollection • DVDs • Videos • Music CDs • CD ROMs • World Languages

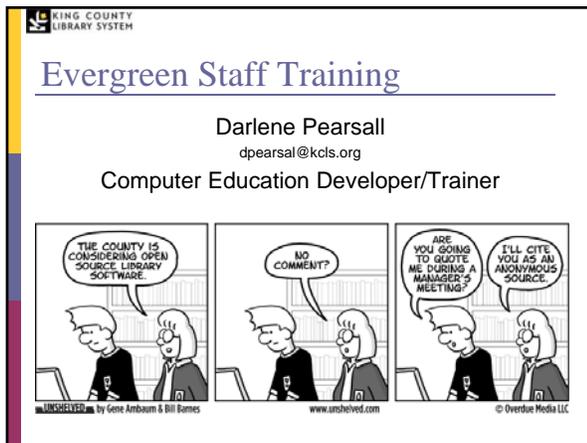
CLOSED Questions?
 What's That's, Book Type, Print & Scan, Run, Stop, Sunday News/Spe...
 AskHow FGI's Reader Reviews













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Lessons Learned

- Version control, version control, version control
- Go Live with as much "vanilla" processes as possible
- If you have a lot of programming, hire your own programming staff (internal or external)

Version Control!



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Lessons Learned

- Have achievement of critical path milestones set go live date
- Advertise to BOTH staff and patrons more then you ever think possible
- Speed Kills – rushing development means lack version control, complete testing in development environment and unhappy patrons



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Burlington, LaConner & Upper Skagit

Maggie Buckholz
Library Director
Burlington Public Library

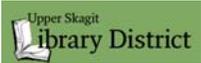
Joy Neal
Library Director
La Conner Regional Library

Aimee Hirschel
Library Director
Upper Skagit Library District

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Yummm We Like Vanilla

- Little to no customization
- Consortium between 3 libraries
 - Burlington (house the server)
 - LaConner Regional Library
 - Upper Skagit Library District
- Went live in 3 months!


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Lessons Learned

- Clarify Terminology
- Clean up your Database!
 - De-duplicate barcodes
- Your going to need a bigger boat!
 - Server capacity
 - Network structure
- Training – just the beginning
- Prepare your patrons

Patience is Important!

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Questions?



For more information visit:
<http://www.nwcentral.org/wla-2011-moving-evergreen>
