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Panelists:

Henry Bankhead and Carol Pham Corrales (Los Gatos)
Jackie Faust-Moreno and Cathi Wiggins (Arcadia)

Moderator: Lori Bowen Ayre

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Koha and Evergreen Big Winners in ILS Turnover Report

Submitted by Lori Bowen Ayre on Fri, 12/31/2010 - 11:15am
 Tags: [Evergreen](#) [ILS](#) [ILS_market](#) [Koha](#) [osls](#) [turnover](#)

Marshall Breeding announced the results of his 2010 ILS Survey and two of the big winners in this year's report are Koha and Evergreen. And, interestingly, the big loser was none other than SirsiDynix.

According to the Breeding's data, 150 libraries migrated to Evergreen (I say migrated but his stats often reflect a "contract" not necessarily a migration).

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Arcadia Migration Update: Cheerleading continues

Arcadia Migration Update: A Present

Open Source – Open Libraries is a consortia of libraries, library systems, and other organizations committed to pursuing Open Source Software alternatives for libraries.

The primary focus of the project is on Open Source Library Systems (OSLS) as potential replacements for commercial, proprietary integrated library systems (ILS).

opensource.califa.org

Who We Are

- From Los Gatos
 - Henry Bankhead
 - Carol Pham Corrales

- From Arcadia
 - Jackie Faust-Moreno
 - Cathi Wiggins

- Moderator
 - Lori Bowen Ayre



Henry Bankhead is the Library Manager for Adult Services at the Los Gatos Public Library. He enjoys reading science fiction, reviewing literary fiction and coming up with good solutions to difficult problems. He is interested in e-books, open source and providing excellent customer service. He has worked for public, academic and special libraries, and has even been a bookmobile librarian. An active father, he lives in San Jose with his wife and children. He has an MLIS from San Jose State University, an MFA from the San Francisco Art Institute in painting and a BA from Stanford in Anthropology.

Carol Pham-Corrales has worked in on and off for libraries for the last 19 years. She has worked for the last 7 years at Los Gatos Public Library. She is currently the Circulation Supervisor/System Administrator for the Los Gatos Public Library.

Jackie Faust-Moreno is the Library Services Manager for Arcadia Public Library. She has been involved with the automation and technology plans and projects at the Library since the late '80s.

Cathi Wiggins has more than 25 years experience in Information Services and Support as both an employee and an entrepreneur—providing network design and management, hardware and software support, helpdesk and training services, web site development and maintenance—and has been a part-time staff person at the Arcadia Public Library for more than 12 years, supervising IS Services for the Library and the Museum.

Claim to Fame

- Los Gatos and Arcadia are the first OS-OL consortia libraries to migrate to an open source ILS (Koha)
 - Los Gatos went live 11/12/10 (from Horizon)
 - Arcadia went live 12/13/10 (from Symphony)
- ByWater Solutions helped with the migration and is providing support and hosting
- Los Gatos and Arcadia will never have to pay for an ILS license again....

Defining Terms

- *Open source license* – defines the rules associated with using the software
- *Open source software* – any software licensed under an open source license
- *Service providers* – those providing services such as development, migration, hosting, support
- *Vendor* – there isn't really a "Vendor" anymore, there are [theoretically] multiple support options

Koha Service Providers

U.S. Based

- ByWater Solutions
- Equinox Software, Inc.
- PTFS/Liblime

Internationally

- Anant Corporation
- BibLibre
- BSZ
- CALYX Information Essentials

- Catalyst IT Ltd
- Libriotech
- LMP
- Nucsoft OSS Labs
- Pakistan Library Automation Group
- Prosentient Systems
- PTFS Europe
- Software.Coop
- Young Innovations Pvt. Ltd.

Evergreen Service Providers

- Alpha G
- ByWater Solutions
- Cherry Hill Company*
- Equinox Software
- Libdata*
- Lyrasis
- PALS
- PTFS Europe

* No Evergreen customers yet

On to the Interviews

- Why Open Source? Why Koha?
- Any Resistance?
- How was migration?
- Hardest parts?
- Recommend Open Source ILS? Recommend Koha?
- Your turn to ask questions...

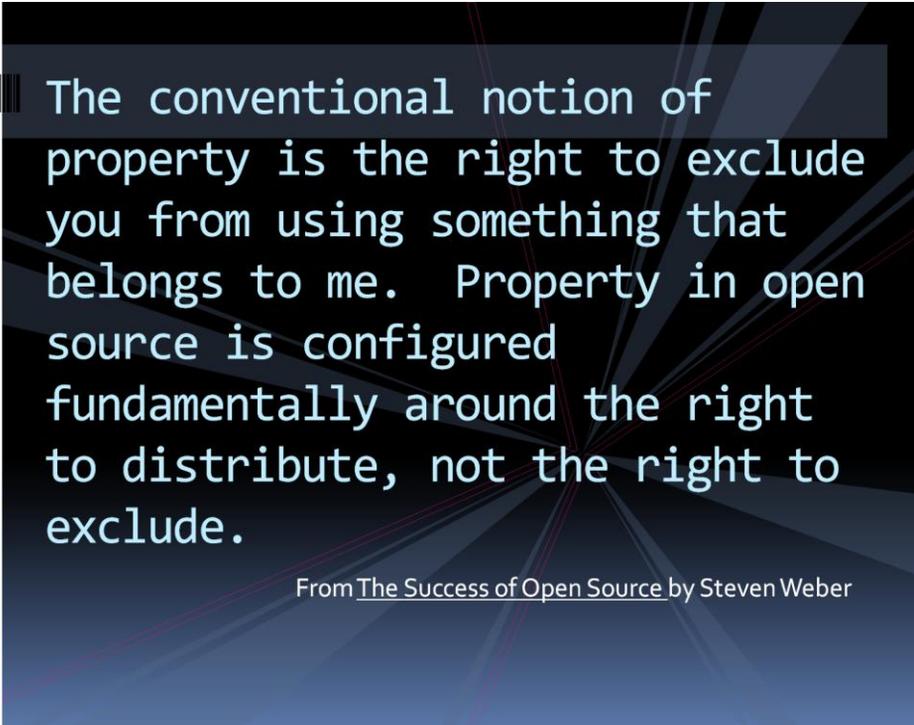
Why Open Source? Why Koha?

Jackie: We wanted more functionality at a lesser price. Our previous system was expensive with increases in maintenance each year, plus we were paying for every little thing... extra SIPs, extra modules. We never could afford adding acquisitions, serials and OPAC extras such as tagging, comments, feeds, lists; this was our chance. We went with Koha because we felt that Evergreen was best suited for larger libraries and consortiums. And, we had seen the *Open Source, Open Libraries* webinars on Koha and we were impressed with the system.

Henry: I decided we wanted to look at open source so I created my own system. I got some advice from Lori Ayre who hooked me up with Brendan from ByWater. After many tries I was able to make a working system or “proof of concept” and upload our records. Based on this and the availability of the OS-OL grant our director gave it the green light. We chose Koha instead of Evergreen because we are a single library and it seemed more accessible. We didn’t really investigate evergreen too much.

Cathi: We were looking for other options to SirsiDynix not Symphony. Symphony was not a bad product, it was actually very stable and we had few problems with it between upgrades, but SD was consistently charging us more every year and we were getting less for it, and they often wanted even more money for things that should have been included in the software package or the maintenance package--finally we just reached a limit. Jackie and I attended a workshop about Open Source that was presented by OS-OL. We began to investigate it more, attending other workshops and webinars on both Evergreen and Koha. We felt Evergreen was directed more at consortiums and that Koha fit our needs better. Then there was the possibility of receiving a grant and a special migration package between SCLC, ByWater Solutions and OS-OL—the stars aligned and the rest is history.

Carol: We were already looking for a new ILS, though it was not quite sure if we were going to stay with SirsiDynix or go with a brand new ILS. It was also due to budgetary issues that we decided to look. We had started to look at Open Source, both Evergreen and Koha. In April/May, we received a grant to move to Koha which was one of the main reasons we went with Koha over Evergreen.



The conventional notion of property is the right to exclude you from using something that belongs to me. Property in open source is configured fundamentally around the right to distribute, not the right to exclude.

From The Success of Open Source by Steven Weber

Did you face any resistance at your Library about your decision and if so, what were the objections?

Carol: We did. We had just seen a demonstration from an ILS Vendor and were really excited about it's capabilities. When we received the grant and were told that Koha was going to be our new ILS, there were some reservation. We had not seen Koha nor Evergreen and were unaware what they had to offer. There was worries about either one them being fully developed yet and would it have the functionality that we were used to.

Jackie: We were lucky to have prepared our City's IT Department ahead of time concerning our future intentions to migrate to an open source product. Our Library Director was supportive too. When we explained that our costs would dramatically decrease, the City was willing to come up with funds for a new server, the maintenance contract and training with our Koha consultant, ByWater Solutions. And it didn't hurt that we received grant funding from *Open Source, Open Libraries* project for the installation and migration costs.

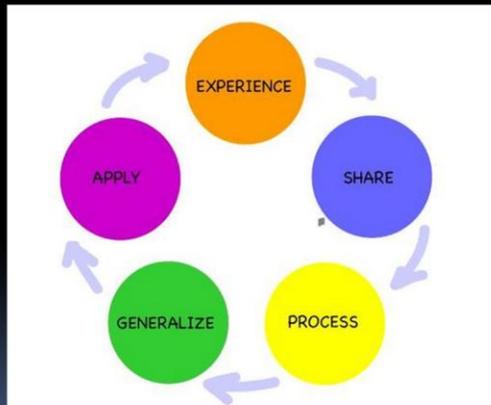
The main resistance at our Library was from staff. The system was different than what they were used to... change is often hard. In some ways Koha is not as robust was what we had been used to. The catalogers were especially disappointed that Koha didn't have all the bells and whistles that they were used to having.

Cathi: I think initially the most resistance came from me. I thought that it would involve more work and commitment as the IS person for the Library than I could realistically buy into because I'm just 20 hours per week. Also, I was a firm believer in not being a technology trail blazer—I never install a new version of software when it was newly released or purchase hardware that was in an early generation. After meeting Brendan Gallagher at a SCLC workshop about Koha that he presented at our Library, we were impressed with Koha and ByWater Solutions. We felt that we would not be left stranded if we were to pursue an Open Source ILS; that they would be a team we could count on in a way we had never been able to count on with SD. The Library Administration was supportive of the idea of Open Source and the concept of being a role model for other libraries, the City was agreeable with the idea of cutting the budget and the concept of future budget savings in areas of hardware requirements and software contracts. Staff had some resistance because of the idea of change, but it wasn't toward Koha specifically, just the idea of "change" in general and once they were able to spend time using Koha much of that resistance faded away.

Henry: I am sure there was passive resistance, but the decision was made at the higher level because of the grant. I believe some staff members wanted to have more input into the decision. They had anticipated a longer period of consideration of all available options. I think some people were unprepared to support a decision that they were not in on making.

Koha is a process. The more you put into it, the more you get out of it

Henry Bankhead



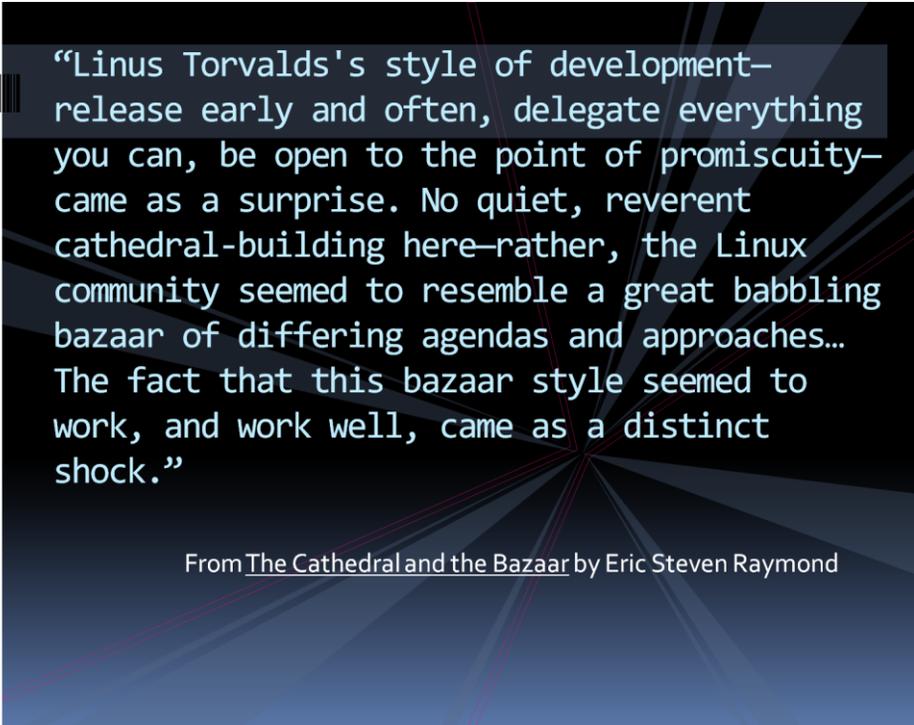
If you have participated in any other migrations from one ILS to another, how would you compare this experience to that (and identify any differences in the process that specifically are related to the new ILS being Open Source)?

Henry: I have only been in a system that went from command line Dynix to horizon which was pretty painless.

Cathi: I've been at the Library for more than 12 years and in that time we've migrated from DRA to Taos to Unicorn to Symphony and now finally—and hopefully it is final—to Koha. With each migration there have been major issues with excessive downtime, converting and losing data, setting the configurations, meeting deadlines, running the scripts, and receiving satisfactory follow-up. We had no ILS or OPAC for more than 2 weeks when we migrated to Taos and lots of data was lost. We received a week of training from the vendor, but there was very little follow-up post migration. We were down—no ILS and no OPAC—for several days following the migration to Unicorn. SD handled the migration, but there was no training and very slow responses from Client Care on any issues we reported. I have performed all of the upgrades of the various Unicorn versions over the years, as well as applying all the patches, with the last upgrade being to Symphony. I did these upgrades because there were always added costs for SD to do them, but support when they didn't work right was part of our contract. Consistently there were issues with the SD upgrade scripts that took some time to resolve. Client Care was somewhat responsive to fix the ILS issues, but the support for the OPAC seemed to always be lacking. Over the course of 2 weeks following one of our Unicorn upgrades I performed the OPAC upgrade 6 different times and then each time had to roll back the system by restoring backups of our original files because Client Care couldn't give me a script that worked or figure out where it failed and I couldn't leave the OPAC in a half-way state. Finally SD client care was able to find where the script was blowing out and the upgrade completed successfully, but not until after thoroughly frustrating everyone. Following that experience we lost a great deal of confidence in Client Care and over the years support from SD had become almost non-existent anyway. We received more help from the Listserv because the Unicorn/Symphony users knew the system better than SD employees. From the minute we signed a contract with BWS they have been attentive, helpful, patient, and have offered support and service at a higher level than we've ever received for any other ILS vendor. BWS handled the secondary setup of the Linux server and the conversion and migration of the data into Koha. They provided training to our staff and have been responsive to post-migration issues. The different phases of our migration ran on schedule, with no down time, little negative impact to the public and few headaches to most of the library staff including having to learn the new system. We were "live" before we opened our doors on our Go-Live day, and that was VERY unexpected given our history but also VERY satisfying and reinforced the idea that we'd made the right choice picking BWS and Koha. Not everything has been perfect...there are things that don't work as we want them to and don't work as they did in previous ILS systems; there are things that we are still learning about and things we haven't yet even discovered, but overall Koha is right for us.

Jackie: We have participated in three other migrations. With each we have had difficulties to some extent. This was the first migration where we had plenty of time to practice with the new system on our "own data" before going live. We were running the previous system on one server and then Koha on another. We had no down time from one system to the other. On Saturday evening we closed our old system at the end of the day, then on Monday morning we were up with our Koha system. And while we did have some migration issues – not everything moved over to the correct place, we were able to conduct business immediately.

Carol: I have not been part of a migration before. When I worked for the County, there was a migration from Classic Dynix to Horizon, but I was not involved.



“Linus Torvalds's style of development—release early and often, delegate everything you can, be open to the point of promiscuity—came as a surprise. No quiet, reverent cathedral-building here—rather, the Linux community seemed to resemble a great babbling bazaar of differing agendas and approaches... The fact that this bazaar style seemed to work, and work well, came as a distinct shock.”

From *The Cathedral and the Bazaar* by Eric Steven Raymond

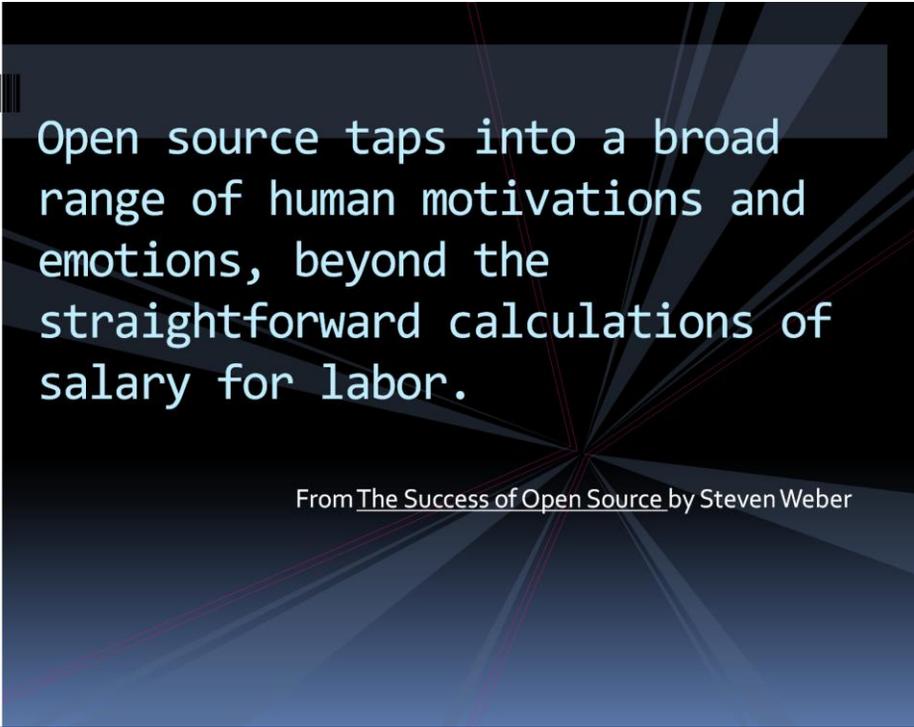
What did you anticipate would be the hardest part of moving to Koha? And, what WAS the hardest part?

Henry: I anticipated that the hardest part would be the data crunching, and it was kind of challenging, but not as much as I thought. I remember a very aha! Moment when I wrote my first sql query from scratch that worked. However, the hardest part, by far, was winning the hearts and minds of the staff and patrons. We had a lot of complaining and some lack of support. I think we could have done more of a “campaign” to prepare staff for the open source world. I thought our three days of training would be enough, but the basic change in the paradigm we are working under is challenging. We are going from a place where when it doesn't work right it is a bad thing to a place where not working the way you want it is an opportunity for improvement. I believe that many of the staff are still not really buying in to this process.

Carol: I anticipated the hardest part to be the migrating of the data. We wanted to make sure that the all the data was moved and were correct. I believe the hardest part was the data migration. We had to configure the old data to match the new data. We had to come up with our own scripts to pull the data and had to get them in a format so that ByWater Solutions could read. We came across a few obstacles such as “Item Status” versus “Location Codes”. We are still working on the kinks until we are satisfied we have the system the way we want it to work.

Jackie: I anticipated that staff buy-in would be the hardest part of moving to Koha—once again, change is hard. I was pleased that in most cases this didn't happen. We encouraged the staff time to practice and learn the new system. We knew that the public wouldn't have trouble using Koha, though we were prepared in case there was confusion. The hardest part of moving was realizing that we didn't fully understand the system. Many of the problems right from the start were configuration choices that we made ... and migration issues. Some items didn't fit as neatly as we would have wished.

Cathi: Getting Cataloging Module to work the way our Catalogers want and expect it to work. They are very detail oriented, wanting our catalog to be precise and consistent at all times, two things that catalogs should be, and that Koha isn't always. This has been the hardest part and I've spent more time with Catalogers than with anyone else ironing out kinks and clarifying our understanding of how Koha “thinks”. Authorities don't work as we well as they should; MARC imports have been complex to figure out though we've got a good handle on them now; the Acquisitions module is not as helpful to us as we had hoped it would be; and there have been some labor intensive “clean-up” issues following the migration that have been completed and some that are still in process. A difficult aspect of being a “trail blazer” is that vendors don't have answers for us as to how to make things work—WorldCat linking, eAudio authentication, MARC & Authority importing from B&T/OCLC, Collections reporting and recording—big issues for us that still don't work properly and there are few resources for assistance.



Open source taps into a broad range of human motivations and emotions, beyond the straightforward calculations of salary for labor.

From The Success of Open Source by Steven Weber

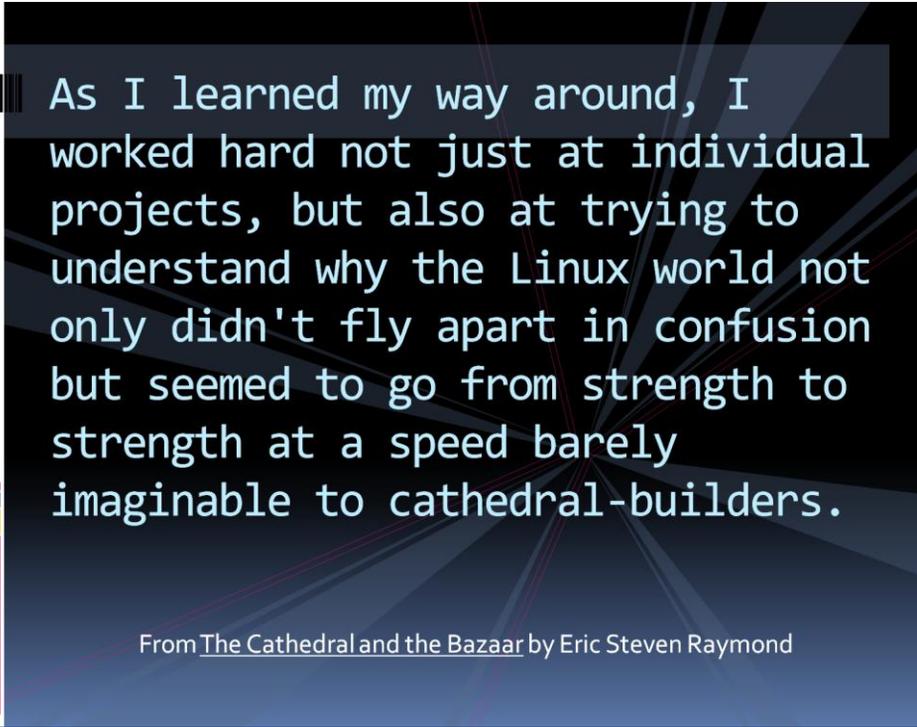
What did you anticipate would be the best part of moving to Koha? And, what IS the best part?

Carol: I believed the OPAC was going to be the best part in moving to Koha. Our old OPAC was very basic with your basic tabs and there was no “wow” factor. The new OPAC is visually more appealing. It is more colorful and easy to use. I, also, found that it is more configurable and that there was no fear that there would be no support if something we changed did not work. As well as, there would not be additional charges to fix it. I also found that not having to pay for additional SIP licenses was great.

Henry: I anticipated that the best part of moving to Koha would be having a totally better and awesome system right away, but that was a dream. I thought that patrons and staff would be all happy for some reason. We are taking more time to make it our own, and it really takes time. It is like breaking in a pair of shoes maybe? It turns out the best part of Koha is owning it. We have paid for or are in the process of paying for, two developments so far, in addition to numerous tweaks. Also I love the batch add cataloging functions and the ease with which we can drop in a bunch of records and then yank them back out.

Cathi: Being able to write our own reports and get more out of our data than we had been able to get from the old ILS and this has actually been more complex than I anticipated. The best part is actually one I hadn’t given as much consideration to—the OPAC, patron-side of Koha. I’ve been very pleasantly surprised with how quickly and easily patrons have adapted to the new catalog. This move to Koha had to be something that would benefit the patrons as much as the staff, and I think it has proven to be a better fit for the public. I’ve also been relieved with how easy it was to make some preliminary customizations to the OPAC’s appearance and look forward to finding the time to do some additional cosmetic adjustments and enhancements.

Jackie: I anticipated that having the acquisitions module would be a great boon for us. We had never had one before and thought that this would allow for fund accounting and our ordering of materials would be streamlined. We soon realized that Koha’s acquisitions would mean double work for us in ordering. We will revisit this in the future with new releases of the software. If I had to choose a “best” part, it would be how easy it is to train staff in its use. We have a new staff member in Circulation with no library experience. She picked up this system easily. When looking up a patron, all of their information is available on one screen... no checking here and there for data.



As I learned my way around, I worked hard not just at individual projects, but also at trying to understand why the Linux world not only didn't fly apart in confusion but seemed to go from strength to strength at a speed barely imaginable to cathedral-builders.

From *The Cathedral and the Bazaar* by Eric Steven Raymond

What would you say to other libraries thinking about migrating from their ILS? Would you recommend an Open Source ILS? Koha?

Henry: I would recommend Koha to smaller systems first, especially ones that don't have IT staff, which we really don't have. It is easier for small systems to make the shift without years of committee meetings. Also I love being hosted in the cloud. I would emphasize to them that YOU DON'T NEED TO HAVE A DEVELOPER ON STAFF. I don't think even King County with their 22 million circs has a developer on staff. I really think the paradigm shift that open source represents is much more in tune with the value system that public libraries are supposed to represent; namely: democracy, sharing, open-ness. I had a patron G. email today in support and he said "Thank you for using open-source software as well. Libraries play an important role on the ongoing battle for our dwindling constitutional liberties, so having the ability (if not the budget :-()) to modify your own installation is much preferable to depending on some questionable motherhood for fixes and improvements." In addition I think we have to get used to continuous improvement in the library world. It is an arena where the bricoleur, who makes do with the code that is at hand has an advantage over the engineer who has thing all planned out in advance. (from Levi-Strauss's *The Savage Mind*). Sure we need engineers too, but what we need above all is the massive cooperation power that Open Source represents.

Carol: I would say think about the current functionality in their ILS. Is it available in the new ILS...Patron side and Staff side? How would it impact Patrons? What is the Library willing to give up to move to a new ILS system? With any migration, a lot of time is needed and so be patient. It may not work right out of the box; but it will eventually get there. I would recommend an Open Source ILS. The idea that the Library would be able to develop their own system to work the way they want it to work rather than being told this is the way system works, I believe is a great thing. Also, the cooperative development of the system with other Libraries is great. With Libraries facing diminishing budgets each year, if a Library finds another Library or 2 who are looking at the same development, then the burden of paying for the development is shared. There is no waiting for an upgrade to get an enhancement/development once it is approved by the community. A Library can immediately download it into their system. There are endless possibilities on developing on an Open Source ILS

Jackie: Make sure you are "willing" to change your procedures. Initially you may have to do without some functions that you are used to having. And of course, if something is lacking that you really need you can always pay for its development. Arcadia set up a blog for our migration experience "*Koha: One Library's Experience*".

Cathi: I'd say you need staff to buy in to it, to commit to it, to give it a chance. It will be different than anything they are used to but it has so many more possibilities than any proprietary ILS systems. The "users" are the ones building and promoting the Open Source ILS systems; rather than the sales, or marketing, or accounting departments that seem to be the driving forces for most proprietary software companies to the end that they seem to forget who and what the software was intended for in the first place. Also, very important, be meticulous in mapping out how things are done in the old ILS and what is the equivalent process or configuration, or near enough, in the new ILS and have a clear understanding of how it works. Spend time learning Koha on a test system if you have a chance and talk to other libraries. A migration will require a lot of staff time both before and after, a dedicated IS person is helpful. If a library is going to migrate to any new ILS they should document the experience well—from beginning to end. There will be successes and frustrations, procedures will be different, features lost and added—go into it fully expecting this and there will still be surprises.

More info about...

- Open Source – Open Libraries : opensource.califa.org
- Downloads for software
 - Evergreen: www.open-ils.org
 - Koha: www.koha-community.org
- U.S. Services Providers
 - ByWater Solutions – www.bywatersolutions.com
 - Equinox – www.esilibrary.com
 - Lyrisis – lyrisis.org
 - PALS – mnpals.org
 - PTFS – koha.ptfs.com

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