Migration without Suffering

Or,

How to Migrate your ILS Without Losing Any Sleep

Or,

What to Expect When You're Expecting (an ILS Migration)

D Ruth Bavousett
Lead Migration Specialist

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Who Is This Chick, Anyway?

Googling for me won't find much; look for J. David Bavousett, instead (but don't call me that, please!)

BA/Computer Science, Abilene Christian University, 1993

5 years administering DRA Classic ILS
4 years outside the field (clinical labs & aerospace)
Led migration project: DRA Classic → Sirsi Unicorn, 2002
6 years administering SirsiDynix Unicorn (now Symphony)
3 years working on Koha
38 go-lives so far in 2011.
Basic Principles

This doesn't have to take months and months. Don't let anyone tell you otherwise, without calling them out on it.
If you're going through a vendor, chances are pretty good that they've dealt with your legacy ILS before. If you're going it alone, odds are someone else has, too.

Ask around!
I have dealt with nine different ILSes since December, plus three home-brewed systems.

Goals: Maximum data, minimum time, zero patron-services disruption, and minimal staff disruption.

“Complexity is not always your enemy, but it is never, ever your friend.”

--D Ruth Bavousett

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Assemble a Toolkit

MARCEdit:


Libre Office—a Swiss Army Can Opener for data:

http://www.libreoffice.org/

Some Perl is REALLY handy. Grab these modules:

Text::CSV_XS    MARC::Record    MARC::Field
http://www.cpan.org/

Programming Perl, by Wall, Christiansen, & Orwant (2000)

Perl Best Practices, by Damian Conway (2005)

Caffeine, angry-sounding music, whatever suits you.

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...and feel free to use some of mine, okay?

One of the benefits of working at ByWater is that I do not write closed code. Every shred of every tool I've written for these migrations is available to you.

https://www.gitorious.org/koha-toolbox/koha-migration-toolbox
Let's Cover the Hard Part First, Shall We?

PEOPLE are the biggest challenge your ILS migration will face!
Commonest complaint:

“I cannot handle CHANGE!”

Eliminate the unknowns that they really fear, and the fear goes away.

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Other Non-Technical Matters--Vendors

RFP:  Does anyone really like these things?

Talk to other libraries. Use LibWebCats.  
http://www.librarytechnology.org/libwebcats/

Treat it like a job interview!

Ask other community players about them.
This is the Part You're Really Here To See...

How do you convert all that data?

Take advice from Shel Silverstein:

Have you heard of tiny Melinda Mae,  
Who ate a monstrous whale?  
She thought she could,  
She said she would,  
So she started in right at the tail.  
And everyone said, “You're much too small,”  
But that didn't bother Melinda at all,  
She took little bites and she chewed very slow,  
Just like a good girl should...

– from “Melinda Mae”,  
by Shel Silverstein (1930-1999)
Migrating the Data

First decide what you want to move.

“Everything” is frequently an invalid answer.

“Have to have” vs. “nice to have.”

Think about the relationships between the data.
Overall Strategy

Now that you know most of what you need to know about the data, think about a migration strategy and timeline.

Plan for two full extracts, done just **exactly** the same way. One for testing, and the final one on go-live weekend.

Write down extracting method—reports, whatever—and the scripts you use to migrate and import the data. Wash, Rinse, Repeat.

TO BE AVOIDED, IF AT ALL POSSIBLE:
Cataloging “freeze”
Patron “freeze”
They aren't necessary, and they don't serve you or your patrons, at all.
All they do is increase complexity.

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Data Manipulations—Bibliographic/Item Records

Do you **really** want to carry over system designator numbers from legacy systems? If your answer is yes, please think again. If the answer is still yes, plan to strip them out when you are done with migration.

Most systems provide mechanisms for exporting MARC or MARCXML with item records included. Barcodes Are Your Friend.

Use MARCEdit, or Perl scripts, to rearrange item fields.

Let Koha ingest these naturally.
Use bulkmarcimport.pl, or stage-and-import.

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Item “Code” Mapping

Consider the “coded” values that your current system uses: “item type”, “collection codes”, “holding codes”, “item categories”...whatever they are called.

Four places for that sort of thing in Koha: Branch code, item type, shelving location, and collection code. Only the first two affect circulation!

Create a CSV map in Libre Office:

<table>
<thead>
<tr>
<th>Holding Code</th>
<th>Branch</th>
<th>Itype</th>
<th>Location</th>
<th>Collection</th>
</tr>
</thead>
<tbody>
<tr>
<td>WANF</td>
<td>WEAVER</td>
<td>BOOK</td>
<td>NONFIC</td>
<td>ADULT</td>
</tr>
<tr>
<td>WAF</td>
<td>WEAVER</td>
<td>BOOK</td>
<td>FIC</td>
<td>ADULT</td>
</tr>
<tr>
<td>CANF</td>
<td>CENTER</td>
<td>BOOK</td>
<td>NONFIC</td>
<td>ADULT</td>
</tr>
<tr>
<td>CVHS</td>
<td>CENTER</td>
<td>MOVIE</td>
<td>MEDIA</td>
<td>VHS</td>
</tr>
<tr>
<td>CDVD</td>
<td>CENTER</td>
<td>MOVIE</td>
<td>MEDIA</td>
<td>DVD</td>
</tr>
</tbody>
</table>

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Data Manipulations—Patron Records

Some fields kept by some systems (i.e. “total amount owed”) do not migrate..ignore them.

Try to create a CSV that looks like what Koha's Patron Import wants.
It Just Works.
While the data is in CSV, take a little time for cleanup: City/State/Zips, phones, address formatting

Use Koha's Patron Import tool. Yes, it's slow, but it works, and it's quite accurate.
Data Manipulations—Everything Else

Barcodes Are Your Friend—use them for linking, **not** system-generated numbers from legacy system.

**Issues/Checkouts:** Barcode of the borrower and item, date it went out, date it is due. Options: Number of renewals, date of last renewal

**Holds:** Barcode of the borrower, and barcode pointing at a biblio (for title level holds) or item (for item level), date it was placed, whether item is on the holds shelf, and current place in the queue (or sort by date later).

**Fines/Fees:** Barcode of the borrower, amount originally charged, current amount due, and why we're billing—barcode of related item, if possible.

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Some Thoughts on Imports and Edits

Use Koha's native tools as much as possible. For instance, use C4::Items::ModItem instead of SQL: UPDATE items SET ...

Try to do imports in such a way that if one phase goes wrong, you can TRUNCATE exactly one table to back up one step.

Do some basic checking at each step, so you don't end up back at the beginning after you've already loaded the final steps—that's really frustrating. Trust me on this. I know.

In your Perl scripts, make sure you give yourself some kind of indicator that it's doing something. Watching the blinking cursor is stress-inducing (and also boring).

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Some Thoughts on Imports and Edits

Don't make manual edits. Fix the script, and reload, instead.

If you ignore that bit of advice, then write down your manual edits, so you can repeat them for the go-live load.

I have basic scripts that do everything normal for a given ILS: (Unicorn/biblio_masher.pl), then a Site/ folder, with specific “manual” edits that the site needs, that the default script won't do.

Computer memory is way, way better than yours. Use it.
Configuring the system

Koha cleverly has the most-important configuration stuff in order on the Administration menu.

Don't spend too much time fretting over configurations. Almost all of it can be changed later, if needed.

Ask questions, particularly about obscure system preferences.

For go-live, the most important bits are:
Libraries
Item Types
Patron Categories
Circulation and Fine Rules

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Back to the People

The more that folks have a chance to “just play with it,” the better they'll feel about how their job changes will work on go-live day.

...but not too long. Otherwise, they'll play with it for a week, then forget about it, then panic on go-live day. Two or three weeks—MAX—works.

Your vendor—if any—will have some testing/training regimen for you to walk through. Try out sample transactions, just like the real deal.

No vendor can tell you that they know perfectly well what happens in your library. If they do, they're lying—they don't work in a library, and they don't work in your library. Call them on it. Then go practice the things that really do happen in your library.
Go-Live Weekend

After the library closes, re-run your extracts, just the same way you did before.

Wipe out biblos, items, borrowers, issues, etc, but leave configuration stuff!

Use your scripts to load the data, just as before.

Test, test, test, each step of the way, just as you did for the initial test load.
Get Involved With Koha

At first, you'll have a lot of questions—that's okay.

Later, if you stick around, you can give back!

Even good ideas, enhancement requests, or a question answered for some other library counts as “giving back.”

http://koha-community.org
Questions?
What's the Best Thing About Koha?
(not an exhaustive list—not even close)
Thanks for being here.
Namaskar.  नमस्ते.

Slides available at:  http://www.librarygeekgirl.net/