

Managing an Integrated Library Systems or a Library Service Platform Migration

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### **Integrated Library Systems: Annotated Bibliography**

Breeding, M. (2018). Systems migration: Opportunities revamp automation strategies. *Computers in Libraries*, 38(2), 17–20.

<https://www.infotoday.com/cilmag/mar18/Breeding--Systems-Migration-Opportunities-Revamp-Automation-Strategies.shtml>

In this authoritative magazine article, Breeding (2018) discusses several key challenges and disruption that libraries encounter during an integrated library system migration (ILS). Conversely, Breeding (2018) presents seven guidelines and strategies that libraries can utilize to cultivate new opportunities during the selection, procurement, deployment of new ILS. Because of the idiosyncrasies of each ILS, Breeding (2018) states that libraries must accept the unique structures of the new ILS to better align themselves to new workflows and new functions. Within the context of academic libraries, Breeding (2018) argues that a shift to electronic resources has prompted academic libraries to consider new systems that better manage e-resources. Furthermore, Breeding (2018) presents the advantages and disadvantages of a data cleanup before and after a migration, while also illustrating the benefits of streamlining and reassessing departmental policies and procedures. Towards the end of the magazine article, the author states that libraries should prepare for a decline in productivity several months after the migration. Breeding (2018) ends the magazine article by declaring that true success of an ILS migration depends less on the efficiency of staff functions and more on a patron's satisfaction with the library's integrated discovery service or catalog. As an independent consultant, lecturer, instructor, and leading figure within the literature on system migrations,

Breeding (2018) emphasizes how an ILS is simply a tool to deliver value and provide satisfaction to library patrons.

Colt, J., & Howell, D. (2021). Cornell library FOLIO case study. *International Journal of Librarianship*, 6(2), 13–20. <https://doi.org/10.23974/ijol.2021>

Jennifer Colt (Head of Automation and Metadata Systems) and Debra Howell (Director of IT Operations) at Cornell University wrote this peer-reviewed article to showcase Cornell University as an earlier adopter of a new integrated library system. After utilizing their legacy integrated library system (ILS), Voyager by Ex Libris, for twenty years, the Cornell Library instituted an exploratory committee to select and develop an open-source platform. The Cornell Library chose FOLIO (the future of libraries is open) after several years of considering other options. Consequently, Jason Kovari declared that an open-sourced system, such as FOLIO, allowed Cornell to customize the ILS to its evolving needs and demands, while also collaborating with other peer institutions (as cited in Colt & Howell, 2021, p. 14). Colt and Howell (2021) organize this case study by the implementation, the challenges of project management and recommendations for future ILS migrations. However, this case study is valuable because the authors emphasize the importance of a vendor (i.e.: EBSCO) who can host the resources and assist with the data migration. Furthermore, the authors demonstrate how the creation of implementation teams and FOLIO subject matter experts facilitated with data cleanup, patron empowerment, record data mapping, preparing various migration iterations, and a seamless crossover between systems. Ultimately, Colt and Howell (2021) assert that communication and transparency are essential elements to a smooth ILS migration, which

quickly address employee burnout during the go-live stage and an eventual decline in productivity during the post-go-live stage.

Day, A., & Ou, C. (2017). Determining organizational readiness for an ILS migration—A strategic approach. *College & Undergraduate Libraries*, 24(1), 103–116.

<https://doi.org/10.1080/10691316.2017.1231600>

In their peer-reviewed article, Day and Ou (2017) convey the strategic planning process to select, assess, and communicate the value of migrating to a library services platform (LSP) for University of Nevada, Las Vegas (UNLV) Libraries. According to Day and Ou (2017), Marshall Breeding originated the term, LSP, to describe a dynamic library system that synchronizes disparate systems with unified functions, support, and management. While the term Integrated Library System (ILS) is used interchangeably with LSP, Breeding perceives an LSP as a unified system that eliminates the need for any independent external programs, such as an electronic resource management system (ERMS) or an independent link resolver (as cited in Day & Ou, 2017). Day and Ou (2017) encourage librarians to select an LSP that focuses on outcomes to better anticipate future requirements and needs. In the context of planning an ILS/LSP migration, however, the researchers emphasize change management as being central to a coordinated migration (Dula et al., 2012, as cited in Day & Ou, 2017). Furthermore, Carmen and Fu identify project management, collaboration, communication, and team work as indispensable elements of a productive ILS/LSP migration. As librarians with UNLV libraries, both researchers underscore the importance of a task force to assess a new ILS, to facility training sessions with vendors, to cultivate transparent communication, and to minimize anxieties.

Guo, J. X., & Xu, G. (2023). Decision-making in the selection, procurement, and implementation of alma/primo: The customer perspective. *Information Technology and Libraries*, 42(1), 1–33. <https://doi.org/10.6017/ital.v42i1.15599>

As experts within the fields of technical services and information technology, the authors of this peer reviewed case study investigate the selection, procurement, and deployment of an Ex Libris-system, Alma/Primo. Guo and Xu (2023) argue that libraries do not select a new library service platform (LSP) in a rational manner because they do not define existing problems, explore all potential options, balance the negative and positive values of each option, and review their institution's values, aspirations, predispositions, and adaptability. Furthermore, a fragile decision-making process also aggravates the following vital functions: data cleanup, data mapping, configuration of systems, communication, training, and staffing. This is an important point because a lack of strategic planning hinders a library's ability to improve its operational models and manage organizational and technological changes. In addition, Guo and Xu (2023) define an integrated library system as a client-based system, while a LSP synchronizes with web applications to improve findability, accessibility, workflows, inefficiencies. Therefore, the authors enumerate OCLC World-Share, Ex Libris Alma, and Innovative Sierra as notable LSP. However, open-source software (OSS), such as Koha, FOLIO, Evergreen, ABCD, Emilda, PMB, NewGenLib, and WEBLIS empower librarians with a higher degree of customization and control, while also providing some of the benefits of an ILS and an LSP. From an economic perspective, smaller academic libraries benefit from exploring OSS because the implementation and hosting cost are lower than ILS and LSP systems. Like other studies, Guo and Xu (2023) also reveal training engagement,

communication, implementation procedures, and data cleanup as important lessons.

These lessons are instructive because participants express dissatisfaction with training sessions from vendors, inadequate staffing, and limited communication that contribute to a stressful and ineffective work environment (Guo & Xu, 2023). Overall, Guo and Xu (2023) clearly encapsulate a library system migration not only as a mere system change, but also as a transition to a new culture. Consequently, this new culture is replenished with new opportunities and unforeseen challenges.

Kohn, K., & McCloy, E. (2010). Phased migration to Koha: Our library's experience. *Journal of Web Librarianship*, 4(4), 427–434. <https://doi.org/10.1080/19322909.2010.485944>

In this peer-reviewed article, the authors use their first-hand experiences as librarians to cogently outline the three-stage process of migration to a new open-source integrated library system (ILS), Koha. While they focus on the first two phases, Kohn and McCloy (2010) reflect on how project management, staff training and effective communication between the Landman Library at Arcadia University and their IT department were valuable lessons. Furthermore, Arcadia University hired an IT liaison who would be embedded with the library providing support during the three-stage process migration. As a medium-sized academic library, the librarians utilized their three-stage migration process not only to engage and align with the new system, but they also employ the phases to disperse the implementation cost throughout various fiscal years. During phase one, the library and IT design a new library website, and the library acquired an ancillary application to create a federated search tool within the website. While occurring concurrently with phase one, the library imitate phase two to analyze, evaluate, test and enhance the effectiveness of Koha. This paper is valuable to the field of library science

because it provides guidelines and recommendations for small-sized to medium-sized academic library that operate with smaller budgets.

McGarvey, V. (2018). Staffordshire University's Koha journey: taking an integrated approach to supporting an open-source library management system. *Insights the UKSG Journal*, 31, 1P–7P. <https://doi.org/10.1629/uksg.411>

McGarvey (2018) conducted a thorough analysis on the strategic approach to an open source (OS) integrated library system (ILS) at Staffordshire University in 2011. Because the migration to Koha presents the University with a technological and cultural shift, McGarvey (2018) outlines the benefits and the shortcoming of an OS ILS, which differ from proprietary ILS. As the Learning and Information Services Manager at the Staffordshire University Library, McGarvey signals how OS systems are trending within libraries because of affordable pricing, innovation, functionality, and adaptability which is commensurate with proprietary systems. In addition to Koha, McGarvey (2018) discusses the launch of FOLIO (Future of Libraries Is Open) by EBSCO in 2017 as another open-source system (OSS) that offers a comprehensive and adaptative platform for libraries with evolving needs. McGarvey (2018) also asserts how a dynamic community of vendors, librarians, and developers have made OS systems ubiquitous. Furthermore, the Staffordshire University Library opted to host their ILS with PTFS. This hosting vendor assisted the library with installation configuration, data conversion, support, training, and software development. An ongoing partnership a vendor empowered the Staffordshire University Library to manage a rewarding cultural and technological transition, which can be brimming with challenges and disruptions to library operations and culture. Conversely, McGarvey (2018) states that OS systems

occasionally present users with substandard usability, functionality, and security concerns, but the author also contends that these disadvantages are lessened once the hosting vendor upgrades the systems and provides training to staff. During the post implementation phase, McGarvey identifies user involvement as an important lesson for other libraries during the various phases of the ILS implementation process.

Moonasar, A. (2022). A leap into the future - migrating to FOLIO - a cataloguer's perspective. *South African Journal of Libraries & Information Science*, 88(1), 1–9.

<https://doi.org/10.7553/88-1-2123>

The author of this peer reviewed article explores the management of an integrated library system (ILS) for the Durban University of Technology (DUT) Library. As a Cataloguing and Classification Librarian at DUT, Moonasar also frames the ILS migration from a cataloging point of view, which is rare among other researchers within the field. The DUT Library migrate from SirsiDynix – Symphony to the Future of Libraries is Open (FOLIO) because they are dissatisfied with the legacy system's convoluted report application and an ineffective serial application that no longer aligns with their library's standards. With a task team of stakeholders throughout DUT, the task team chose FOLIO because of its reduced implementation cost, system flexibility, innovation, sustainability, customization, and vendor support as a hosted cloud system. During the planning process, the DUT Library and EBSCO develop a strategic project plan that ensures constant communication and status updates with staff to assist in reducing anxieties, foster ownership, and embolden staff. Data clean-up is another important planning process because it ensures a high degree of quality assurance and quality control for print and electronic resources. While the author discusses the three phases of migration (Kohn



& McCloy, 2010, as cited in Moonasar, 2022), the author also introduces the opposing idea of a single phase go-live implementation and how many libraries favor the single phase go-live implementation (Gutierrez, 2019; Singh, 2013, as cited in Moonasar, 2022). In addition, Moonasar (2022) describes deficiencies in inventory control, integrated reporting features, validation of authority records, deletion of bibliographic records as significant limitations for FOLIO. Because FOLIO is still in its nascent stage, it depends on an active community of developers and librarians to address these limitations with solutions. Ultimately, the author recommends to test data uploads prior to the go-live, to assemble a diverse task team, to avoid hastening evaluation and migration process, and to avoid conducting other major projects simultaneously with the migration project.

Motin, S. H., & Salela, P. M. (2006). A liaison model for integrating the library, IT, web, and marketing teams. *Technical Services Quarterly*, 24(1), 1–15.

[https://doi.org/10.1300/J124v24n01\\_01](https://doi.org/10.1300/J124v24n01_01)

While this article is seventeen-year-old, the authors present the liaison team model as a relevant approach to ensure collaboration between librarians and technology professionals. A liaison team consists of librarians, information technology specialist, web developers, and communication staff who aim to ensure efficient communication and engagement with faculty in all colleges and departments throughout the academic institution. According to Motin and Salela (2006), the liaison team model was developed at St. Cloud State University's Learning Resource & Technology Services (LR&TS) through the visionary efforts of various academic dean advisory councils, and steering committees composed of representatives from each college. These entities acknowledge the effectiveness of integrating technology within libraries, while, also fostering

collaboration through education, retreats to brainstorm ideas and strategies. In addition, the LR&TS formalizes the responsibilities of the steering committee, creates a mission statement to guide liaison teams in strengthening communication with faculty and staff, markets services, fulfills the needs of patrons, and integrates the liaison team model into the institution. In addition, the LR&TS also conducts assessments for each college liaison teams as a tool to develop concrete goals for each college liaison team. Ultimately, this research is valuable because it creates clear guidelines for academic institutions on how to operate a liaison teams, how to create of project plans, and how to conduct official retreats. Furthermore, the liaison team model can be extremely advantageous during the selection, procurement, and implementation of an integrated library system (ILS).

Ridgeway, E. (2019). Collection management, assessment, and development: Reviving collections during LMS implementation. *Serials Librarian*, 76(1–4), 86–88.

<https://doi.org/10.1080/0361526X.2019.1588613>

In this brief but substantive peer reviewed article, Ridgeway (2019) explores how the migration to a new integrated library system migration at the Southwestern Oklahoma State University (SWOSU) contributes to various collection development projects. These collection development projects consist of data cleanup, removing obsolete print and electronic titles, and purchasing more relevant and in-demand databases and titles with cost saving measures that cut databases with low usage. As an Assistant Professor and Electronic Resources and Serials Librarian of this small regional university, Ridgeway (2019) introduces a nuance idea by juxtaposing an ILS migration with collection development to best serve the current informational and academic needs of patrons.

Because SWOSU announces a phased implementation to update the university's student

information system, SWOSU Libraries aim to complement this new system with a new ILS that would reduce operational cost and simplify library processing. Consequently, SWOSU Libraries selects the World-Share Management System (WMS) by the Online Computer Library Center (OCLC) to fully synchronize and integrate products that are usually sold separately by other vendors. Ridgeway (2019) argues that WMS presents SWOSU Libraries with a cost-efficient option that would function efficiently with a small technical services staff and resources to streamline the cataloging process. While the SWOSU Libraries deploys a collaborative approach to identify defective records during the post-go-live stage, Ridgeway (2019) highlights how various external factors negatively impact the system migration. For example, Ridgeway (2019) identifies budget cuts, library renovations, and an expansive donation of an archival collection as significant external changes that challenge the productivity and effectiveness of a small academic library. Therefore, this research is extremely valuable because it demonstrates how a small academic library succeeds with factors within its control, while it may ultimately crumble under the pressure of external forces affecting academic libraries.

Rinna, G., & Swierenga, M. (2020). Migration as a catalyst for organizational change in technical services. *Technical Services Quarterly*, 37(4), 355–375.

<https://doi.org/10.1080/07317131.2020.1810439>

With ample experience in the areas of collection development, cataloging and metadata, Rinna and Swierenga (2020) describe the organizational change that emerged from Western Michigan University (WMU) Library's five-year migration to a library services platform (LSP). Because the authors argue that a library's Technical Services or Resource Management department is the most impacted by a LSP migration, their

research focuses almost exclusively on their Resource Management Department. Within this research, the authors argue that the key differences between an integrated library system (ILS) and a LSP is that an ILS is localized within an institution's server, but a LSP is a cloud-hosted system. Rinna and Swierenga (2020) argue that a LSP migration also has the potential to transform the library's reorganization and its staff because the library develops a mindset that is receptive to transformational change. Because restructuring workflows and organizing departments is innate to a LSP migration, Rinna and Swierenga (2020) provide four practical case studies that reflect their LSP migration as a medium-sized university with four library branches. Pepperdine University Libraries' migration to OCLC's World-Share is a noteworthy case study because it illustrates streamlining cataloging, metadata, and automation as key features of OCLC's knowledge base. As a component of organizational change, Rinna and Swierenga (2020) emphasize how WMU libraries utilized William Bridge's transition model, Peter Senge's model of a learning organization, and the agile management philosophy to gradually construct a meaningful culture that considered the psychological, creative, and collaborative aspects of an organization. Rinna and Swierenga also demonstrate how the invisibility of technical services is driven by automation technologies and electronic resources that make this department more susceptible to budget cuts. From their research of LSP migrations, WMU Libraries convened a Selection Overview Committee to phase the migration project into the following: Research and Education, Selection and Preparation, Migration and Integration, Cutover and Shakeout, and finally Project Evaluation. Ultimately, this research is valuable for the field of librarianship because it

illustrates how a LSP migration can advocate for the user-focused and service-oriented qualities of a technical services.