Migration & Training

Preparing Your Data and Your Staff
Growing Evergreen Conference
April 22, 2010
Early Projects

- **Projects**
  - Inventory
  - Weeding
  - Data Cleanup
  - Policy Review

- **Staff Allocations**
  - Variety of Staff (particularly catalogers)
  - Potential: New employees or volunteers
  - Outside Vendors
Early Planning

• Hardware
  ASP vs. Customer-Hosted

• Training
  All Staff or Train the Trainer

• Policy Development
  Rethink Current Policies & Procedures

• Documentation
  Developing Local Materials

• Marketing
  Get the Word Out!

• Staff Resources
  Nothing Works Without the Proper Staff
Project Initiation
- Contract
- Schedule
- Weekly Calls
- Staff Buy-in

EG Install & Config
- Hardware
- EG Install
- Policy Config
- 3rd Party Products
- Testing

Data Migration
- Cleanup (optional)
- Extracts
- Analysis
- Mapping
- Test Load
- Final Load
- Data Freezes

Go Live Preparation
- Training
- Install Software
- Document local practices
- Marketing
- Prepare Site
Go Live Considerations

- Will the library close at all?
- Will you keep your current ILS live for a period of time?
- Will this be a “soft launch”?
- What kind of press and documentation do you need to prepare & support your community?
Post Go Live

Critical: The First 30 Days

• Live Check of Data
• Continued Policy Review
• Investigate New Workflows
• More Training
• Check Everyone’s Pulse!

Support Transition

• Support Introduction (right before go live).
• Three Methods: Email, Phone & Portal.
Training Your Staff

Developing a Plan for Training
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Assess Your Training Needs

- Who?
- What?
- When?
- Where?
- Why?
- How?
Who and What?

- IT Staff
- Consortium Administrators
- Local Administrators
- Front Line Staff
When and Where?

On-site Training

Remote Training

Blended Learning
Why?

- Reduce staff anxiety
- Create staff enthusiasm
- Increase patron confidence
- Reduce support tickets
Train the Staff

- Project Manager
- External Trainer(s)
  - IT Staff
  - Local Administrators
  - Front Line Staff
Talk With Your Staff

• Explain OSS
• Demo the system
• Provide hands-on practice before and after formal training
• Share documentation
• Share development news
• Explain how to get help
• Continue training
Talk With Your Trainer

- Share library workflow
- Share staff skills
- Share current system requirements
- Share your goal for the training
Questions?

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