



GROWING EVERGREEN
2010 INTERNATIONAL CONFERENCE

Migration & Training

Preparing Your Data and Your Staff

Growing Evergreen Conference

April 22, 2010





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Harvesting the Data

Time Lines & Tips for Data Cleanup

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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?



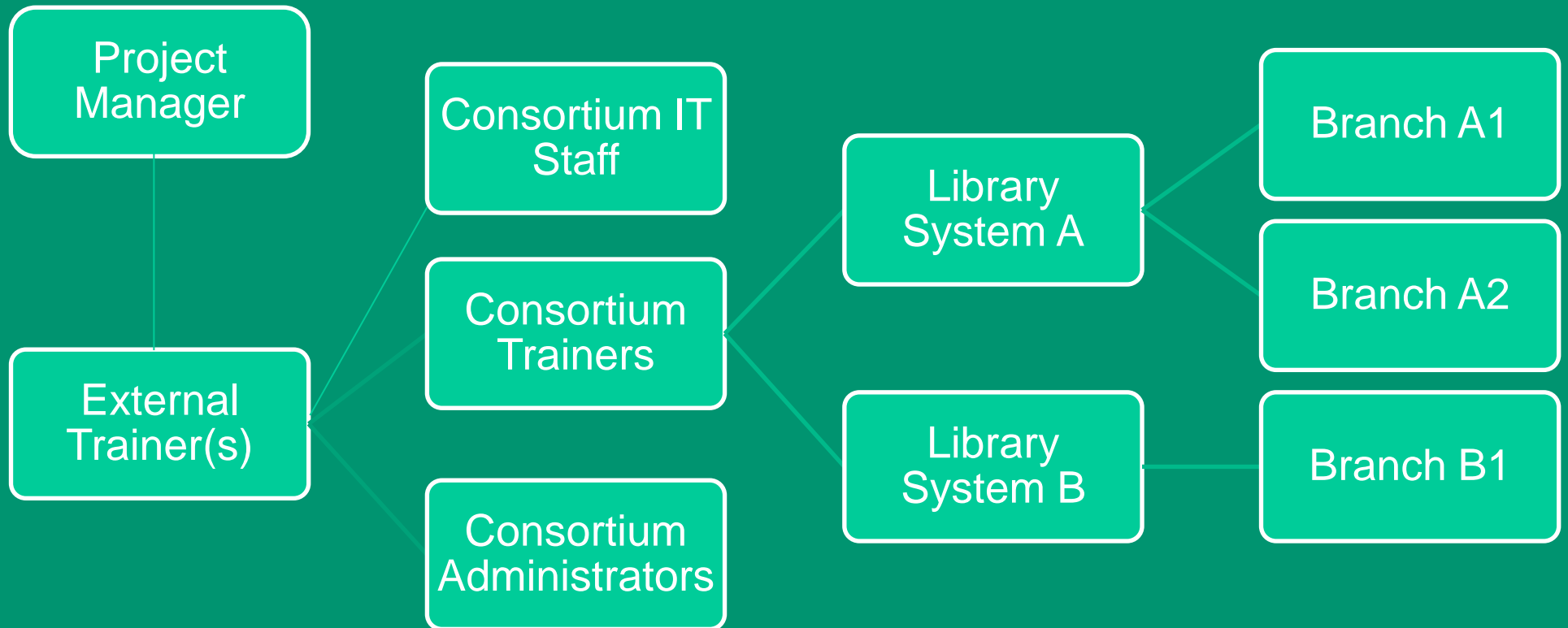
- Reduce staff anxiety
- Create staff enthusiasm
- Increase patron confidence
- Reduce support tickets



Train the Staff



Train the Trainer



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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