



Lessons Learned from a decade of system migrations

Presented by:

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Central Library Consortium

NOTSL Dec. 2022



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<https://clcoho.org/category/conferences/>

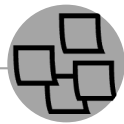


AGENDA



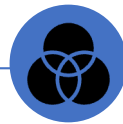
BACKGROUND

What I do and don't know



TEAM

Who should be on your team?



DATA

What is important and what is difficult



TIMING

What you should do when



TOOLKIT

What are some useful tools



My
background

25 years in Public Libraries

Worked with structured data

Migrated dozens of systems

I suck at authority control

Let's find out
about you



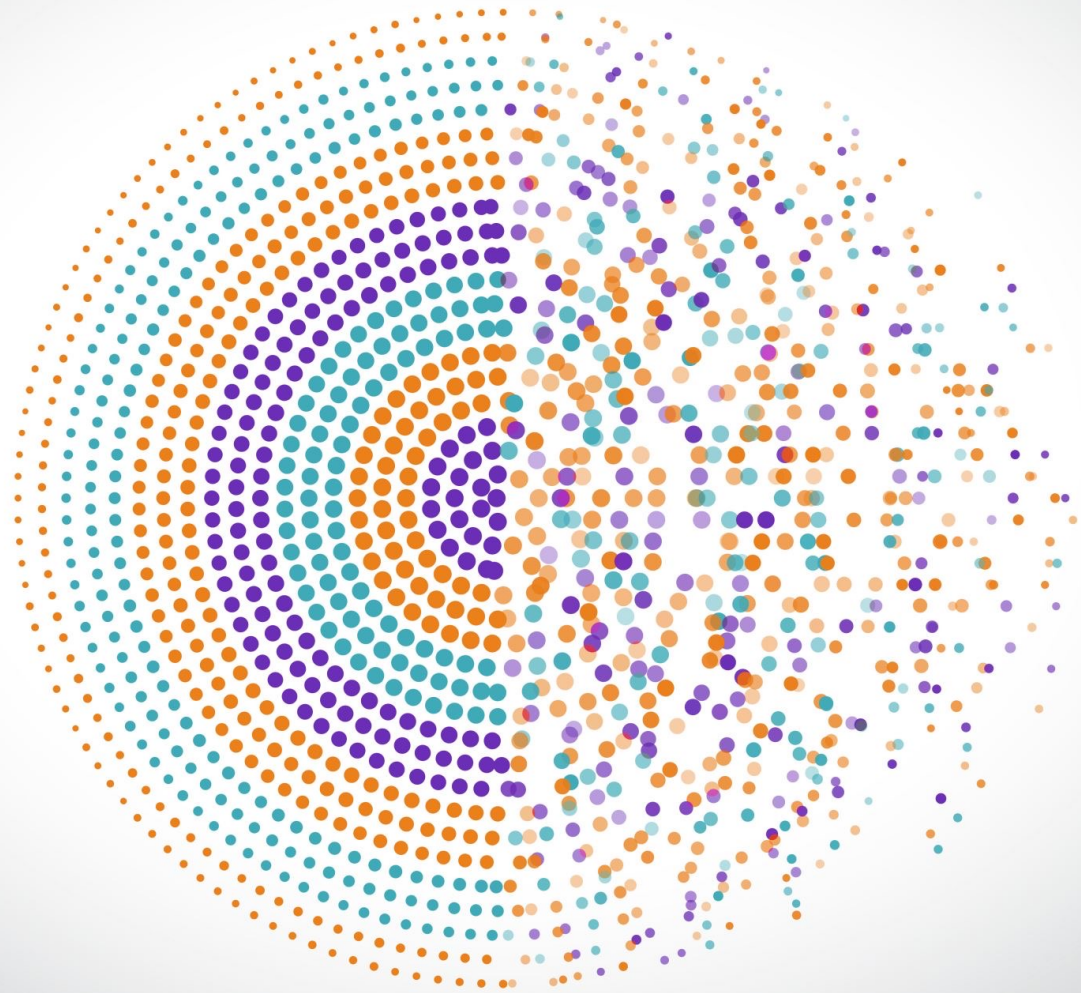
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You know
your data
best





You aren't
the first



You are in control

Your team

Someone who knows your power users

Someone who is familiar with your new system

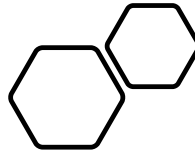
Someone who knows spreadsheets or loves to comb through data





Great
opportunity
for growth

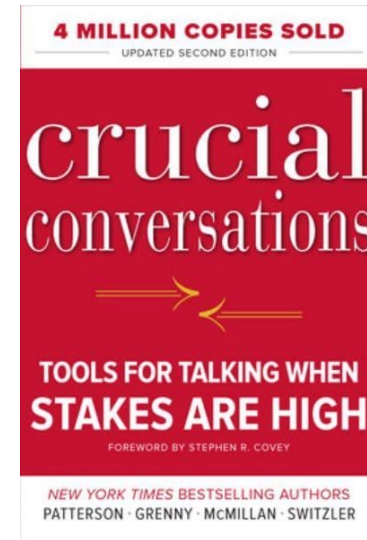
Working with others
in the organization

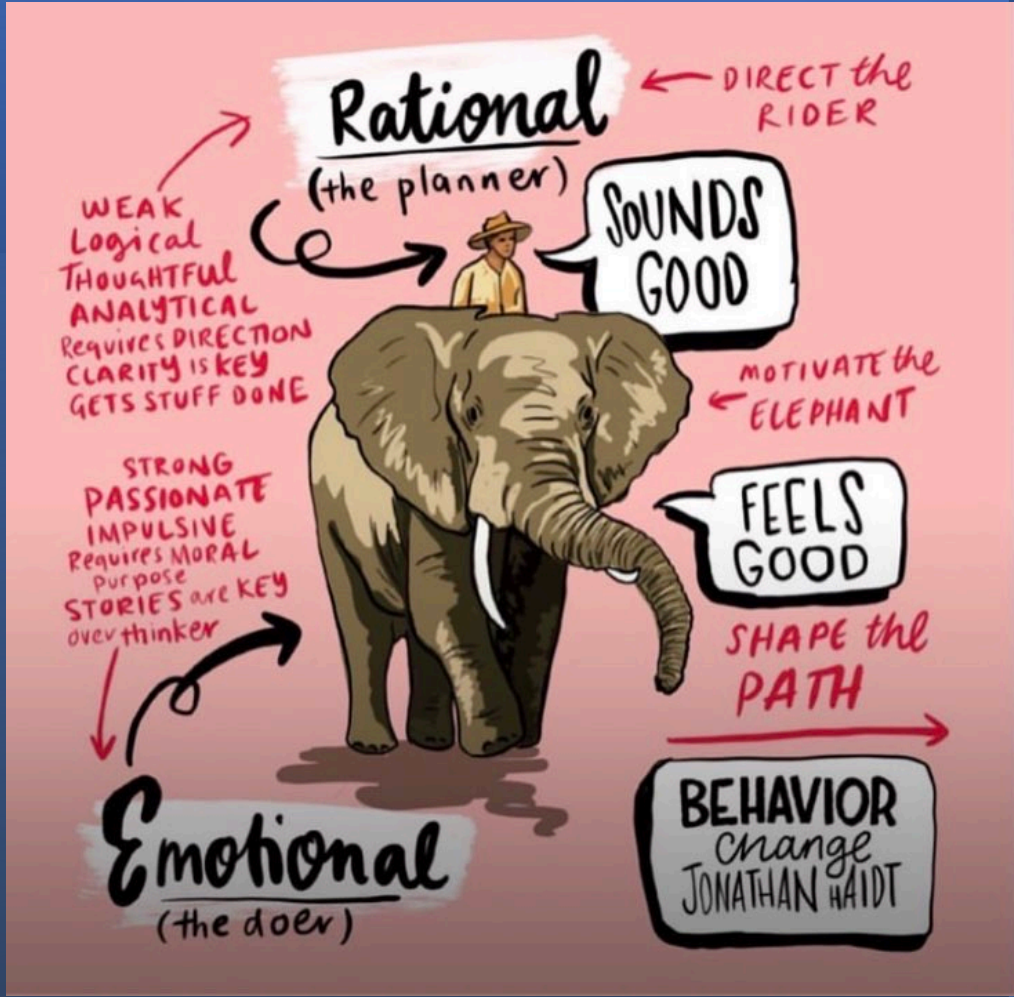



[https://www.worldcat.org/title/
1290489949](https://www.worldcat.org/title/1290489949)

Have a heart.

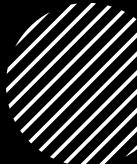

What do you really want?







Maintain relationships with current vendor



You'll need their help to extract data



Check licensing requirements if you need old system for reports



The world needs more kindness



Understand your new vendors
preferred communication
method

If they prefer email, batch similar issues
together – don't send ONE massive email

Use good subject lines

Do NOT send patron data via email




What data to migrate

Spotting high
complexity
low migration
value records

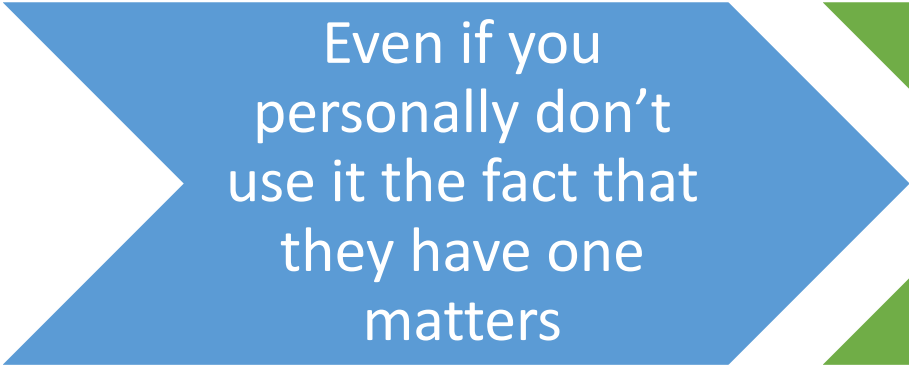




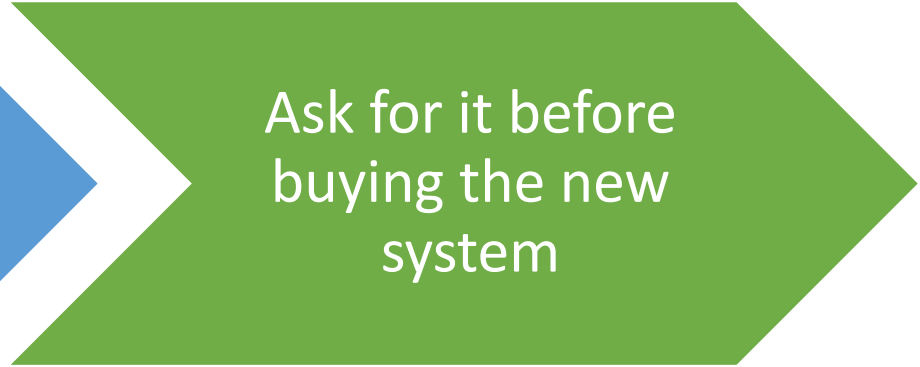
Ask your New
Vendor




Request a copy of the data migration guide for the new system



Even if you personally don't use it the fact that they have one matters



Ask for it before buying the new system

A photograph of a server room. In the foreground, several server racks are visible, with blue and yellow lights glowing from the equipment. The background is filled with more server racks, creating a sense of depth. The overall lighting is dim, with the primary light sources being the server components themselves.

Don't fret over data you can't move

If your new system doesn't
support it, you don't have to
move it!



The more connections, the more difficult

A Patron Record



Items out



CKO History



Notice History



Payment or fine balance history



A serials record

- Bibliographic Record
- Item Record
- Serials Holding Record
- Issue Record
- Publication Pattern
- Purchase Order
- Purchase Order Line Item
- Invoice
- Invoice Line Item

Customer
facing data
priority



- If it is user data, make it a migration priority
- For example: Properly migrating how patrons are notified about account transactions



Focus on the data more
people interact with



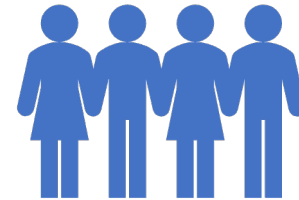
How many people manipulate the records?

The fewer the more likely the data is specialized to the current system and may NOT feasibly migrate

Quiz Time – Where should you focus?



Customer data priority



More staff interactions = higher
priority

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A close-up photograph of a server rack. The image shows several vertical server units. Each unit has a circular green light at the top and a rectangular red light at the bottom. The lights are glowing, and the overall scene is dimly lit with a blueish tint. The text "Some data might get left behind" is overlaid in white in the center of the image.

Some data might get left behind

Don't delete it yet

Even if you aren't keeping it, that info could still be helpful in mapping data from the old system into the new one



Manual input is a teaching tool

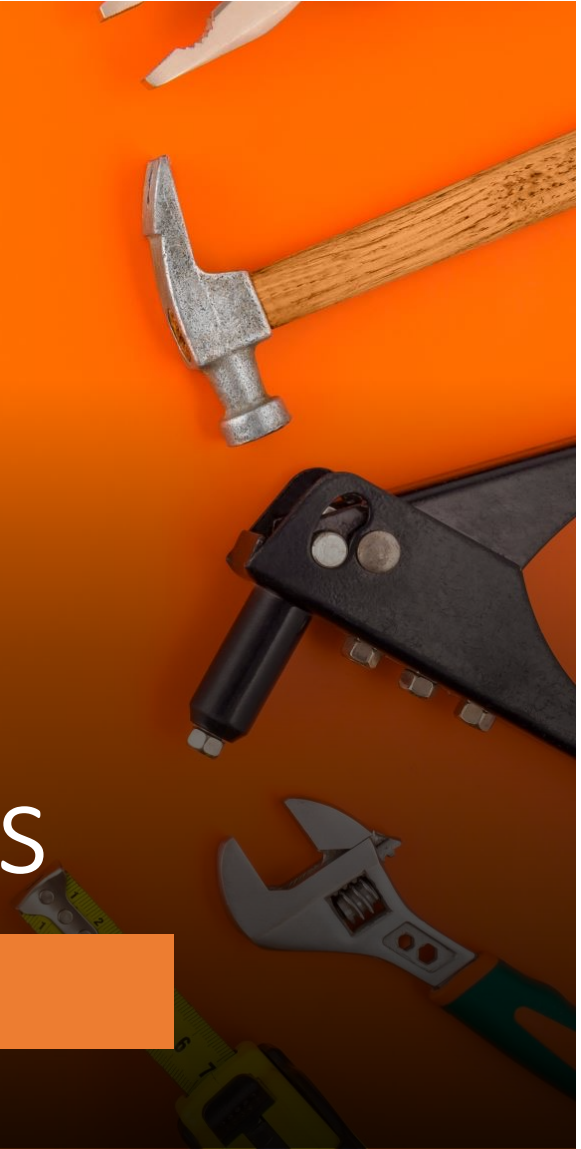


Spending time learning how the
new system works



Instead of cleaning up a messy
import

Your new system may
have better cleanup tools



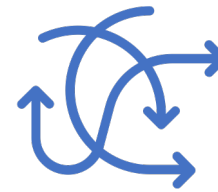
Public Library Migration Cautions



Holds / Reserves /
Requests



Fine and Payments

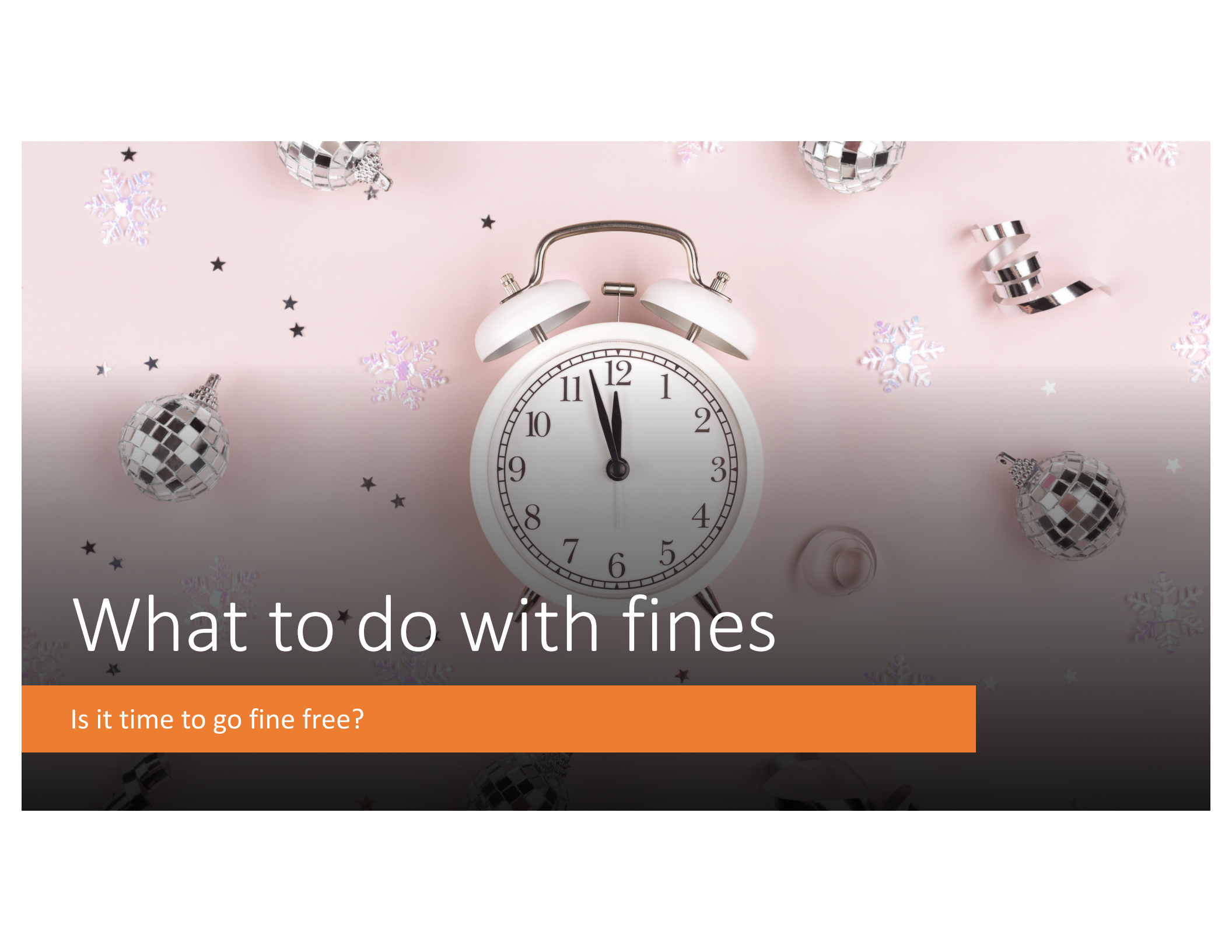


Lost titles

What to do with holds

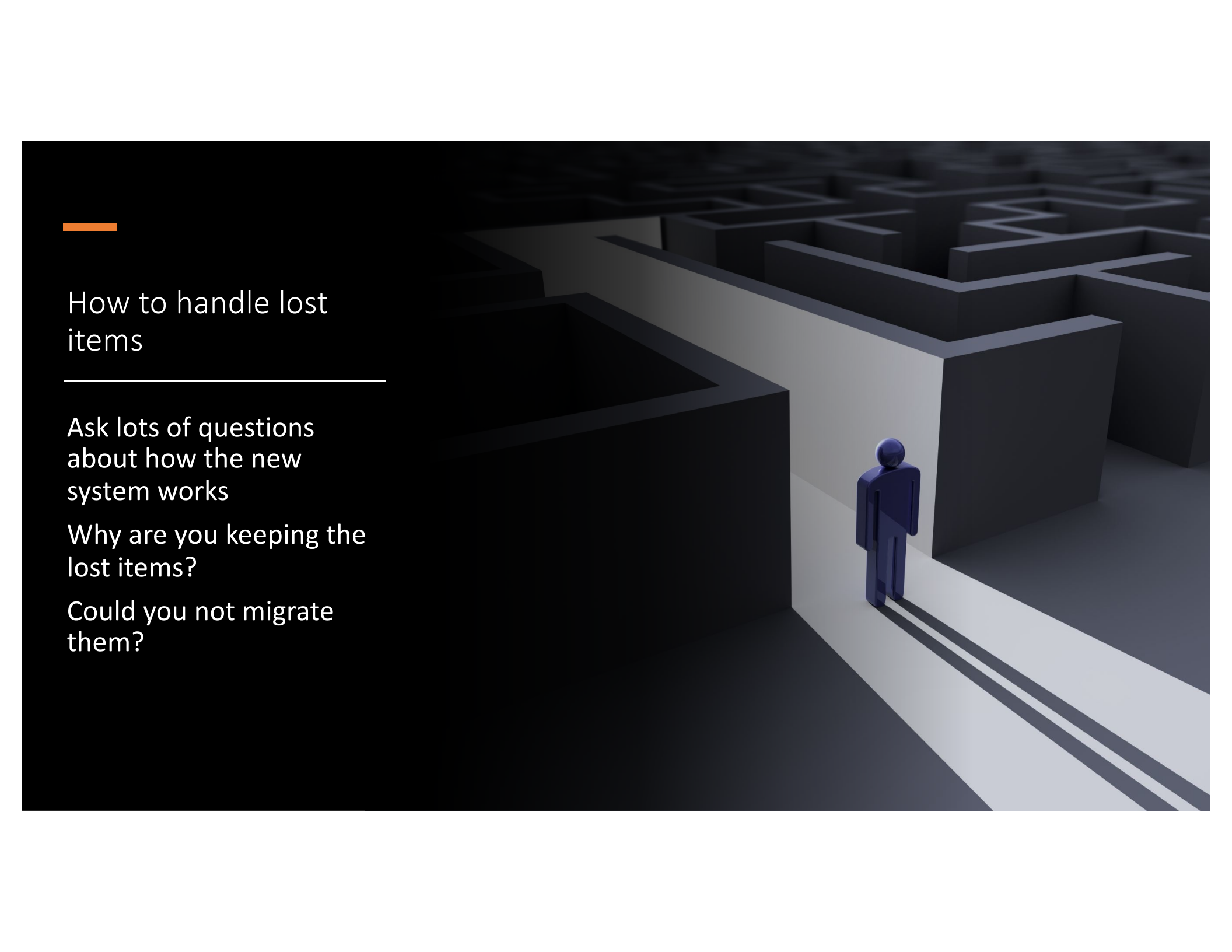
Don't migrate them

**Special word of caution for
consortia**



What to do with fines

Is it time to go fine free?



How to handle lost items

Ask lots of questions about how the new system works

Why are you keeping the lost items?

Could you not migrate them?

When to migrate?



Consider your typical annual cycles



Academic Library:
Slow Summer Session



Public Library:
Busy Summer Reading



Other migration date considerations



When do you run stats & reports?

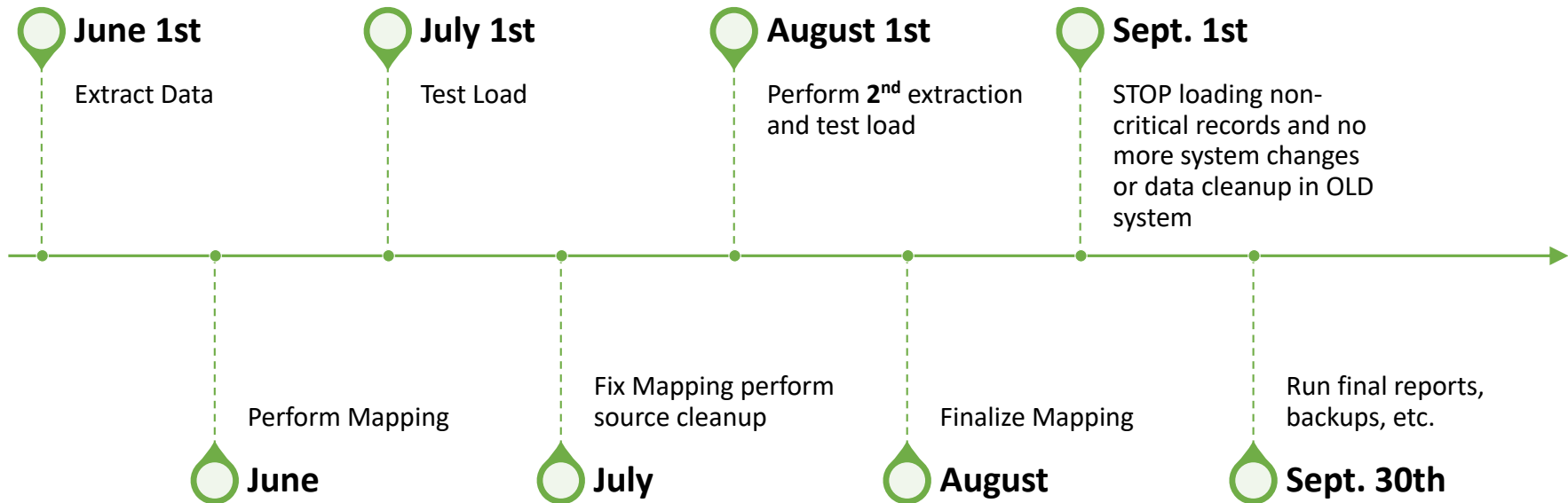



When do contracts expire?



Slowdown activity prior to migration

Sample timeline – Oct. 1st go-live





If you can't do two test data loads

Ask about version control process on data
import scripts

What to do with old data? Keep It!

Good	In plain text export files.
Better	In the old system.
Best	In the new system.

Benefits of having old data in new system



Quickly reprocess old data if needed



Running Reports from previous time periods



Answering “Why did this migrate wrong?”

What to watch for in the data



Non-printable characters



Spaces / Line Breaks



NULL things that
shouldn't be (barcode
fields, etc.)



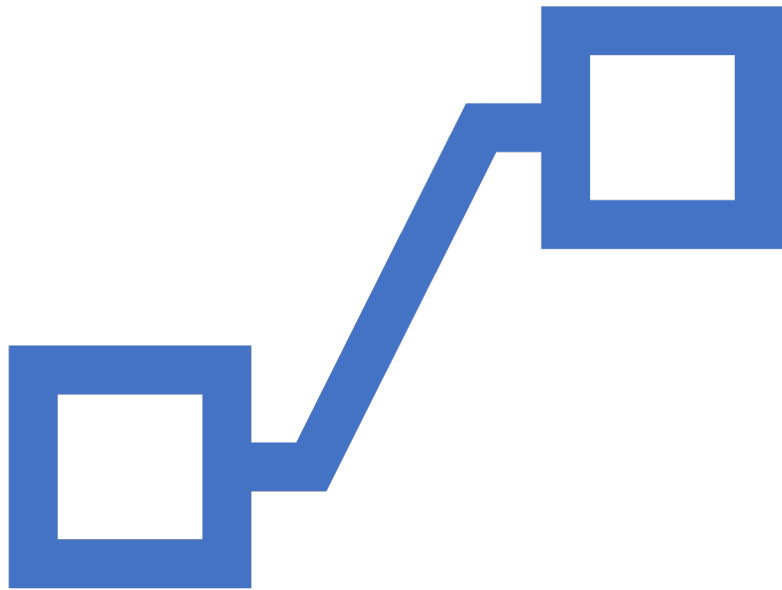
Unexpected delimiters

Join at

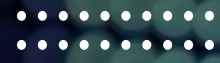
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Special
considerations



Be mindful of call numbers

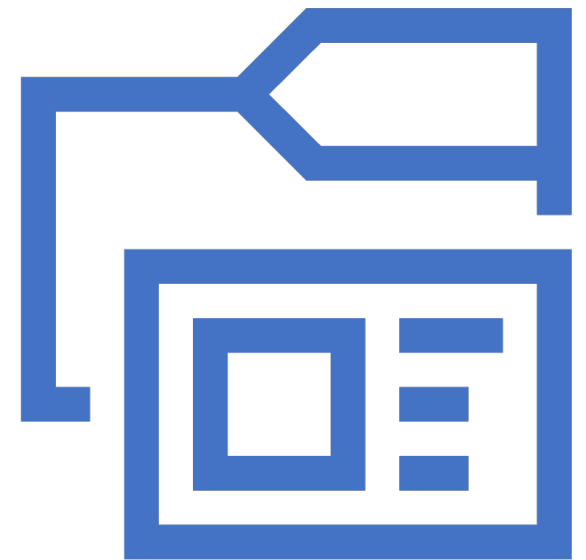
Some systems use the MARC
display

Some systems use the item
display

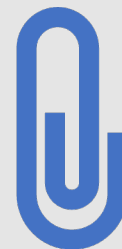
If you are joining a consortium

When de-duping MARC records, always keep the EXISTING record – this makes migrating holds HARD

If you are a small library, it may be easier to manually attach add your items to existing records



If you are leaving a consortium



Attach consortium records to a single “unknown” title/patron



Special tools

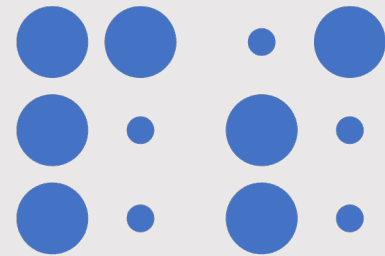
Regular Expressions (AKA regex)

Near universal system for finding and replacing text

A life-long skill

Tutorial: <https://regexone.com/>

Playground: <https://regex101.com/>



A good text editor



Should support regex

Should support large files

Should support line wrap / un-wrap

EmEditor

Windows

Fast

Large Files

Not Free (Trail)



Emurasoft
EmEditor

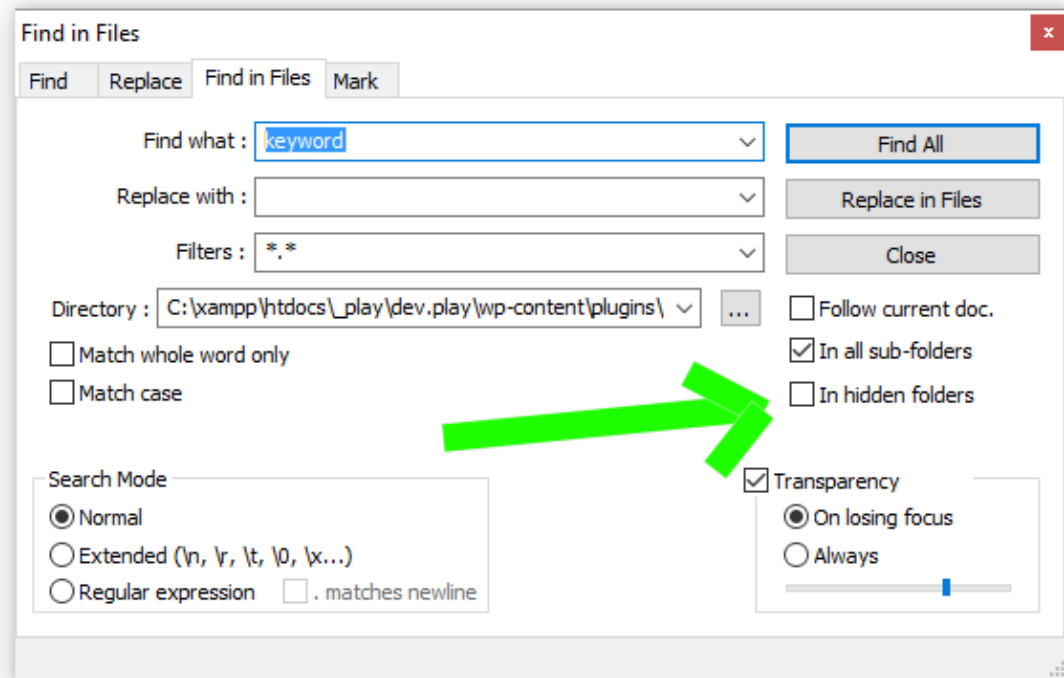
Notepad++

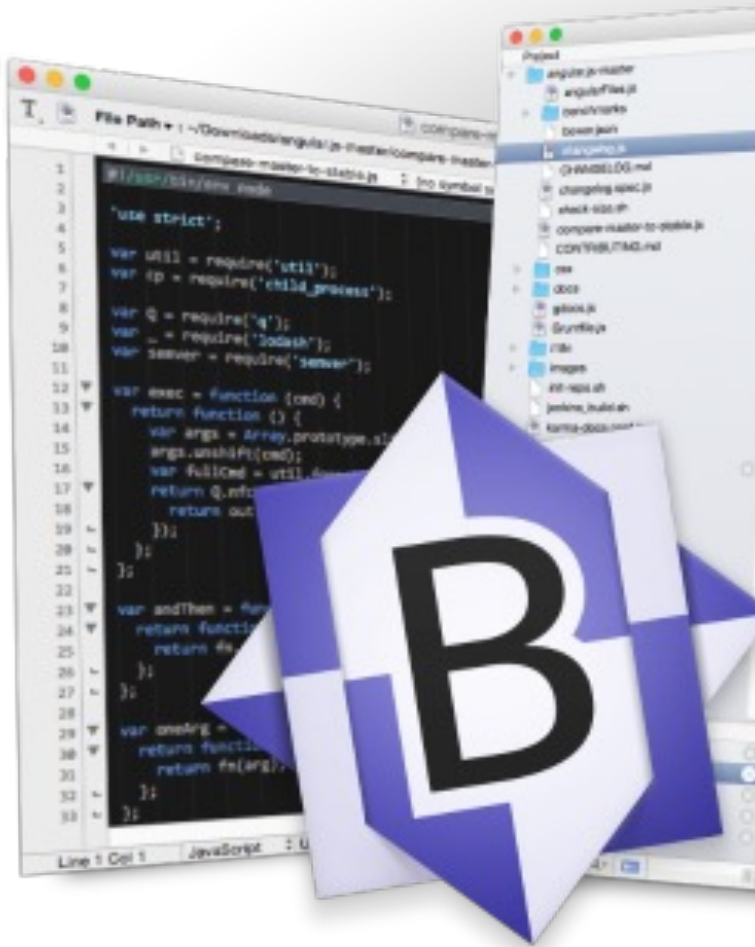
Windows

Free

Find in Files

Slow on large files





BBEdit

MacOS

Fast

Large Files

Free & Paid Version




Other ways to manipulate text

Powershell (Windows):

<https://redmondmag.com/articles/2020/04/07/how-to-use-csv-with-powershell-1.aspx>

Grep (Linux & Mac):

<https://www.cyberciti.biz/faq/howto-use-grep-command-in-linux-unix/>



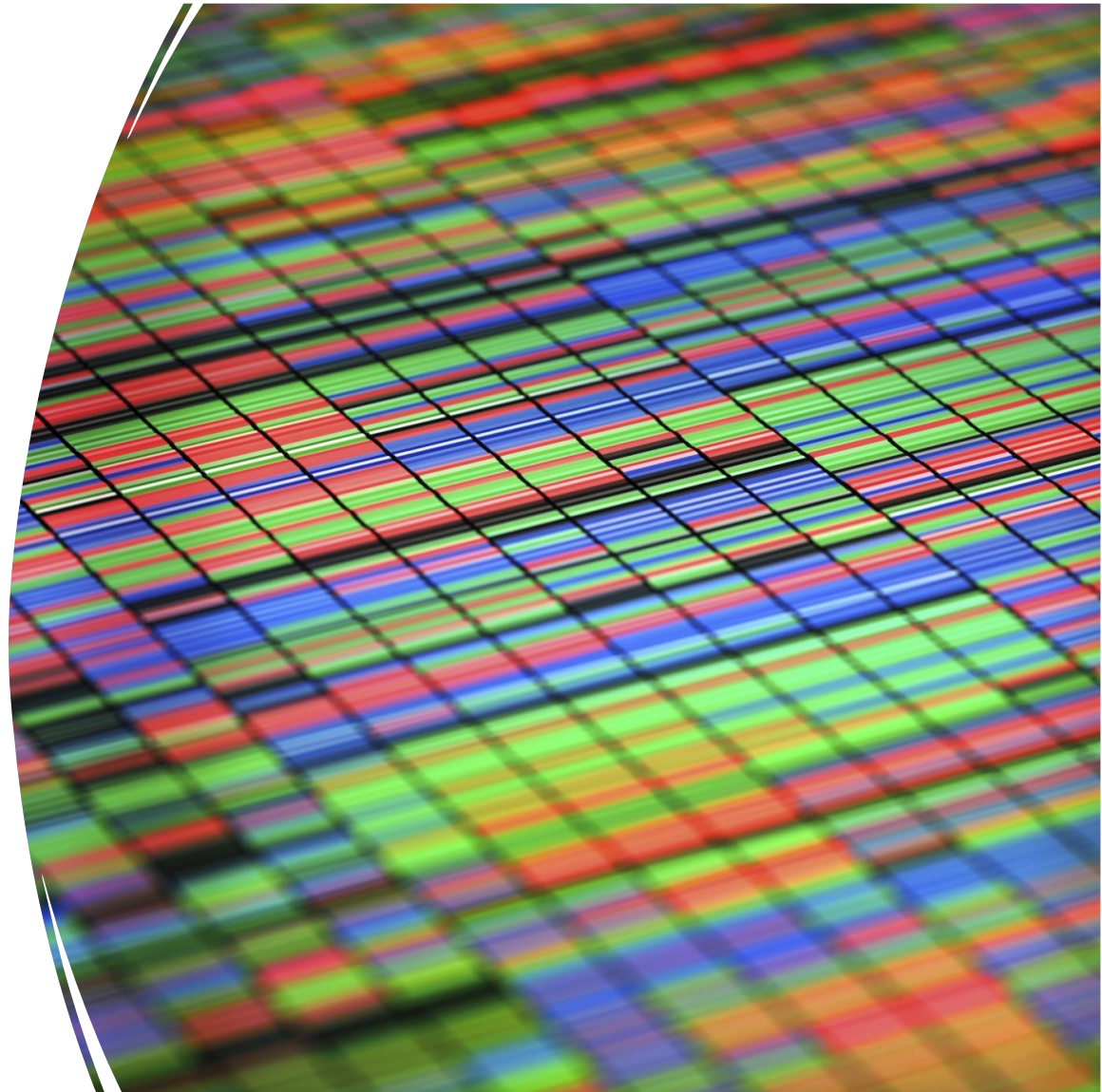
Your favorite spreadsheet

Expand your spreadsheet knowledge

Filter columns to look for unusual data

Use pivot tables to group and spot weird data

Be VERY careful with the ways it might “mangle” data – use text export





New (AI) tools on the horizon

<https://flatfile.com/products/workspaces/>

<https://dromo.io/pricing>



OpenRefine

Openrefine

Can large tabular datasets

Can parse different types of data

Get started:

<https://www.youtube.com/watch?v=nORS7STbLyk>

<https://multimedia.journalism.berkeley.edu/tutorials/openrefine/>

MARCEdit



REGULAR EXPRESSION
SUPPORT



DE-DUPING SUPPORT



TREATS MARC FILE AS
INDIVIDUAL RECORDS



Use tools to spot problems

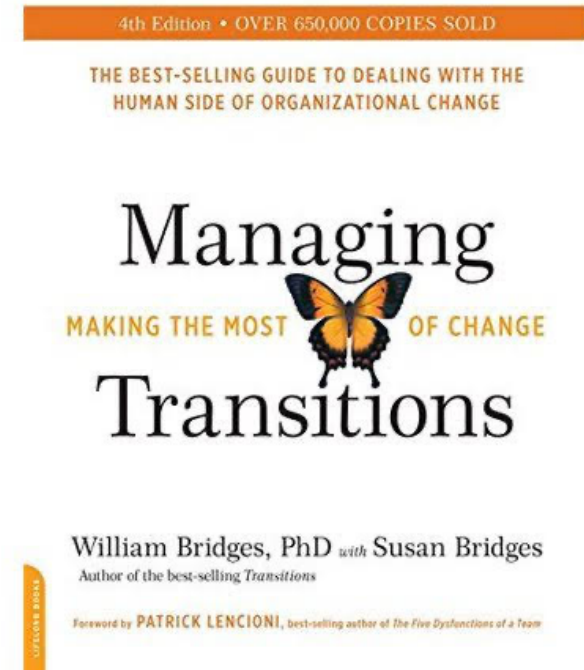
Do NOT cleanup data during migration

Clean up data in OLD system

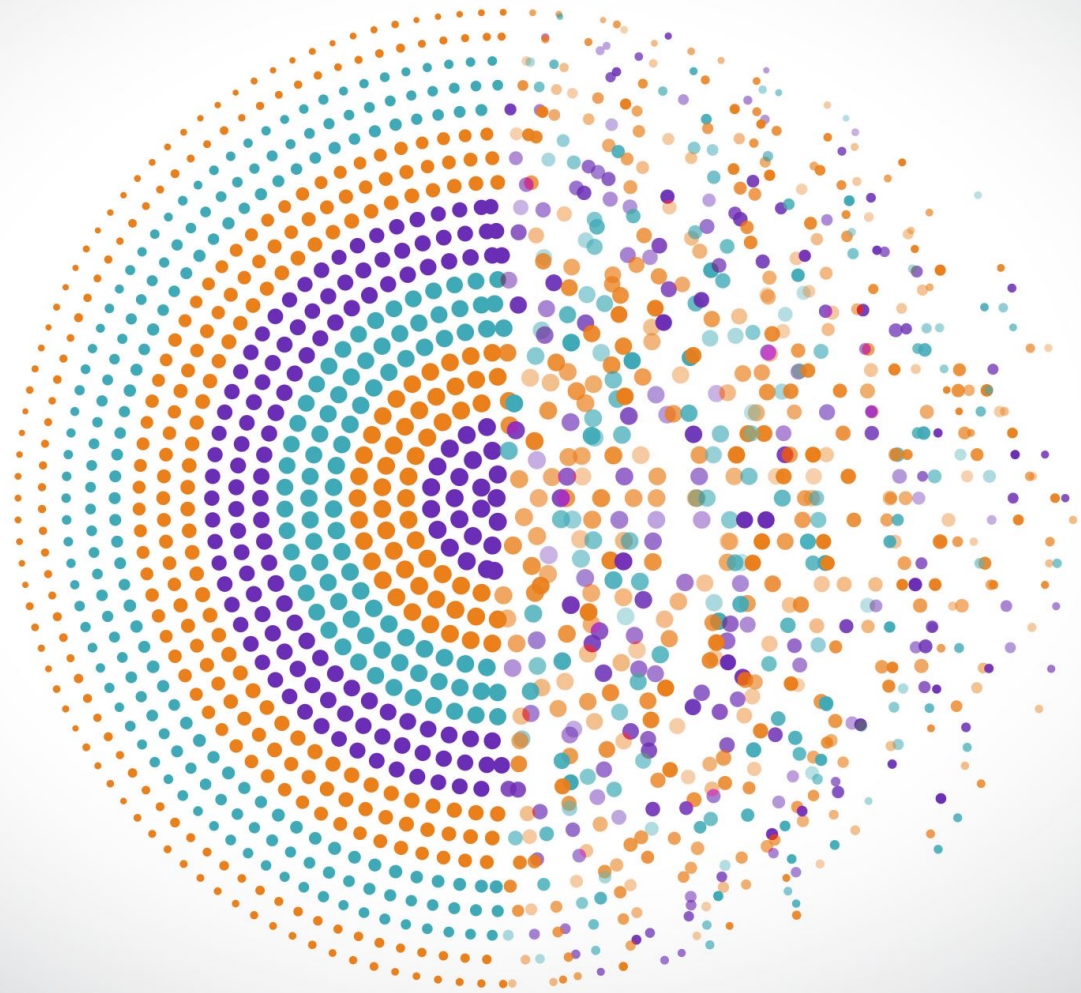
OR alert data migration person of issues
WITH EXAMPLES

Managing transitions : making the most of change

<https://www.worldcat.org/title/961035058>



You know
your data
best





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