INTRODUCTION

As libraries seek ways to save money in this period of declining budgets, one of the factors that may attract attention is the integrated library system. License and support fees for traditional ILSes continue to rise, while functionality frequently does not keep pace. Libraries may look at open-source systems such as Koha and Evergreen as possibilities; these systems are consistently adding new functionality, and both have active developer communities around them. Additionally, there are support vendors available, if the library does not have the technical expertise to “go it alone.”

However, if library staff have gone through one or more ILS migrations in the past, they may be reticent to do so again, even with the stated goal of saving significant amounts of money on licenses and support. This reticence may come from a number of factors in the library’s institutional history, including frustrations with vendor representatives, lack of openness or robustness in the data-manipulation process, insufficient testing and training protocols, and the slow pace of the work.

Here, we will discuss a process for migrating from a closed-source ILS to Koha, as an example for how to construct a process and team to do so effectively and with minimal stress and cost. It is to the intrepid souls that are facing the new ILS selection and migration process that this chapter is dedicated and to whom it is addressed.
ABOUT KOHA AND OPEN-SOURCE SOFTWARE

Koha is a free-for-the-taking, open-source integrated library system, first developed in 1999 for the Horowhenua Library Trust, in New Zealand. Its development is ongoing, centered around a community web site at http://koha-community.org. Koha is in use by libraries around the world, of all types, and new releases are coming out regularly. The community maintains a number of mailing lists to support development efforts and the user community, and knowledgeable people are available on the team IRC most hours of the day (Koha Community). Additionally, there is a useful bibliography of Koha development and history on Zotero, at https://www.zotero.org/groups/koha/items

Koha is licensed under the GNU General Public License, or GPL, Version 2. In short, this means that anyone may take the source code, and use it for any means that they can devise, and modify it in any way that they desire, so long as the modified code is, in turn, given under the same license. No license fee may ever be charged for software under the GPL (Free Software Foundation). This means, of course, that multiple support vendors may arise who are “selling” the same software—in truth, they are not selling the software, but their migration services, support, custom programming, hosting services, and/or training. Libraries may choose one of these vendors, or may utilize in-house expertise to install and implement Koha in their library.

CONSIDERATIONS FOR THE MIGRATION PROCESS

Role and Selection of a Vendor

It behooves you to make a careful, honest evaluation of in-house talent before deciding whether or not to engage a vendor. In the case of Koha, a good understanding of Debian Linux, Perl, and MySQL is needed; the system administrator for the Koha system will need a practical knowledge of installation and configuration of all these components to successfully “spin up” the Koha system. Additionally, if the library is planning to perform their own data migration, then someone with an extensive knowledge of Perl or other scripting languages will be needed, to manipulate the data. This person should have or be prepared to acquire a thorough knowledge of MySQL and the Koha data structures, as well as the structure and composition of the legacy ILS data.

Many libraries either do not have this level of expertise on-staff—or have the available time for those staff members to work on the migration to and maintenance of a new ILS. Enter the vendor community. Obviously, if a library is statutorily required to go through a Request for Proposal (RFP) process, then that is the first step.

As an aside, let’s be honest for a moment: No one likes RFPs. Library administrators do not like having to create or process them, and vendors dislike having to answer them. However, they are required in many jurisdictions, so everyone grits their teeth and charges on. You can make this process a bit less painful by making the RFP as brief as possible—only strenuous enough to satisfy your statutory or process requirements. Pages and pages of endless questions about functionality, which may or may not apply to that library, or the proposed solution benefit no one; in the case of an open-source system, the answers will be very repetitive, since the software is the same. Use the RFP to ask the big questions about standards and broad functionality, and about what the vendor can do for the library, rather than trying to make it into a training course on the ILS.

When selecting a vendor, it is common practice to ask the vendor for customer references. When asked, vendors are usually pretty careful to choose customers who really like them, so it follows that this exercise really does not inform the potential customer very well. In the case of an open-source
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