Coming Soon to a Library Near You: An Open Source ILS

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The Sage Library System of Eastern Oregon is taking utilization of open source to a whole new level this year with the migration from our current integrated library system (ILS) to the open source Evergreen ILS (http://www.open-ils.org). Following in the footsteps of the Georgia PINES consortium, where Evergreen originated, and other consortia nationwide, Sage is forging new ground in the hopes of improving library service for our member libraries while maximizing budget dollars. The project is in full swing, with an expected "go live" date of December 15, 2010. This time next year, I will have a fuller understanding of the impact of the migration, but for now I can at least share the composition of Sage, the project's history and status, data migration challenges, and what we hope to gain by this momentous leap.

Since its beginning in 1992 as three libraries joining to form the Pioneer Library System, the consortia has focused on resource sharing and cooperation. Eighteen years and several grant-funded expansions later, the consortium, renamed to Sage, is 64 members strong, spanning twelve counties of Eastern Oregon. Its membership is diverse, encompassing academic, public, school, and special libraries. Sage offers different membership tiers based on level of participation, annual circulation, and number of holdings. Some member libraries maintain holdings in the Sage system for resource sharing, but either have their own circulation system or are not automated. Several from this group have withdrawn from Sage in recent years, mainly in K–12 schools, as budgetary shortfalls force administrators to cut what are perceived as extraneous services. However, Sage continues to grow, working to accomplish greater objectives as a unit than could be done individually.

Sage's introduction to the Evergreen ILS began in Fall 2007 with a presentation by Doug Hendrichs, Library Services and Technology Act (LSTA) Advisory Council member, and Jim Scheppke, State Librarian, describing the statewide Georgia PINES system's implementation of Evergreen. The vision of what the software could mean for Sage, as well as the state, was embraced by the Sage Council. The Council decided to apply for LSTA funding to test the software's suitability for Sage with the understanding that a migration grant application would be submitted the following year if the test was deemed successful. In March 2010, the Sage Council voted unanimously to migrate to Evergreen as soon as operationally and functionally possible.

Despite tremendous development strides since its introduction in 2006, Evergreen still fell short in the areas of acquisitions and serials, key functions required by Sage member library Eastern Oregon University. Software that was originally designed to meet the needs of public library consortia was only recently being adopted by academic libraries. EOU decided to migrate circulation and cataloging modules along with the rest of Sage, but retain the acquisitions and serials modules on the current ILS until the end of the fiscal year, allowing more time for development of these functions in Evergreen.

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Another area of concern with the Evergreen software was the limited functionality of the catalog editor. In the PINES system, cataloging was done outside the system, so there was really no need for a robust editor. Sage, however, utilizes a wide variety of cataloging sources. With a large number of libraries supplying records, there is a continued need for de-duplication of records and record enhancement. To that end, Sage received additional LSTA money to fund cataloging module development work, which should be completed this fall. Because of the nature of open source software, this benefits not only Sage, but the entire Evergreen community. Programming an interface between Evergreen and OCLC Navigator for EOU's participation in the Orbis Cascade consortium is also slated for development. The surging number of libraries and consortia adopting Evergreen is being accompanied by aggressive development in several functional areas and the enrichment of community support resources, many of which are highlighted on the Resource & Sharing Cooperative of Evergreen Libraries (RSCEL) Web site, http://rscel.evergreen-ils.org.

Currently in the project, servers are being configured for the production environment, to be followed by data migration and customization of the software. Migration of all bibliographic and item data will occur twice, once for data analysis and another in preparation for going live. Simultaneously, consortia efforts are being made to cleanup existing records, prioritizing those areas impacting functionality in the new software. Deletion of non-active patrons and long overdue items will be encouraged, as well as performing inventory before migration.

Customization of new software also affords us the opportunity to look at settings and codes from a new perspective. Added to this mix are three automation projects, and the need to add barcodes to the collection of a couple libraries whose holdings lack them.

Along with configuration and cleanup work, training will be a key factor in the successful transition from one ILS to another. Basic instruction in Evergreen circulation and cataloging will be provided through individual site visits and reinforced by weekly training exercises starting in September. Regional training slated for November will provide an opportunity for review, as well as provide additional training on expected software updates. Since all sites are "going live" at the same time, it also important for us to identify key people throughout the twelve-county region to serve as the first tier of support in the initial aftermath of the migration.

All in all, this migration will mean a lot of work, and there are days when I wonder what we were thinking. But, in the end, it will be worth it. Moving to open source software allows Sage to take advantage of new features at no additional cost unless we choose to fund development. Features such as bookings, rotating collections, and enhanced OPAC content are just a few examples of added functionality that will exist within Sage after migration.

Another major benefit we will gain by moving to Evergreen is access to and control over our data. Access to the data opens the door to interface possibilities with other software, interoperability which can create greater efficiency for patrons and staff. Ultimately, by using open source software for our ILS, we have the freedom to choose how our money is spent, whether on strengthening in-house support or contracting out for support services. For Sage, the time has come to move in a new direction, that of the open source software Evergreen.