



Growing Pains : Migrating from a Locally Built ILS to a Vendor System



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CATskILLs



The people of
CATaloging
and ILL
the CATskILLs

Early days as a Cataloger - 1985



With a retiring co-worker and my predecessor manager - 2014



Metropolitan Library System

Serves Oklahoma County

700 square miles

750,000 population

19 library locations

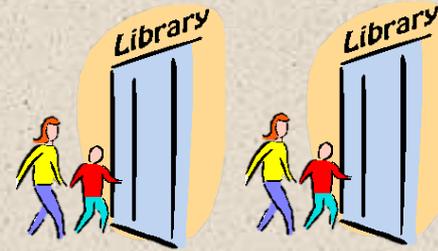
8 in Oklahoma City proper

11 in communities throughout the county



Growth since 2004

New libraries opened



New buildings constructed



Structural renovations completed





In the works

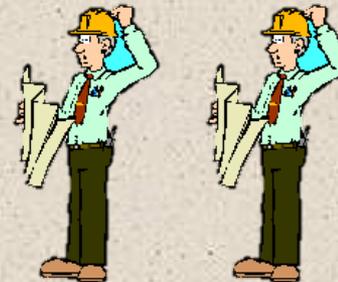
New building completion



Structural renovation beginning



New building design



In talks ...



Impact on Technical Services





Materials Services Division

**Materials
Selection**

**Technical
Processing**

Cataloging

**Interlibrary
Loan**



Materials Services

Materials Selection



Selects titles

Places orders

Encumbers funds

Technical Processing



Receives materials

Authorizes payments

Processes materials



Cataloging

Classifies materials

Uploads catalog records

Creates item records

Interlibrary Loan



Requests, receives and
returns borrowed items

Obtains and lends items



Materials Services Locations

Materials Selection

Downtown Library



Technical Processing

pre-2010

Capitol Hill Library

2010-

Service Center



Cataloging

pre-2010

Capitol Hill Library

2010-

Service Center



Interlibrary Loan

pre-2010

Downtown Library

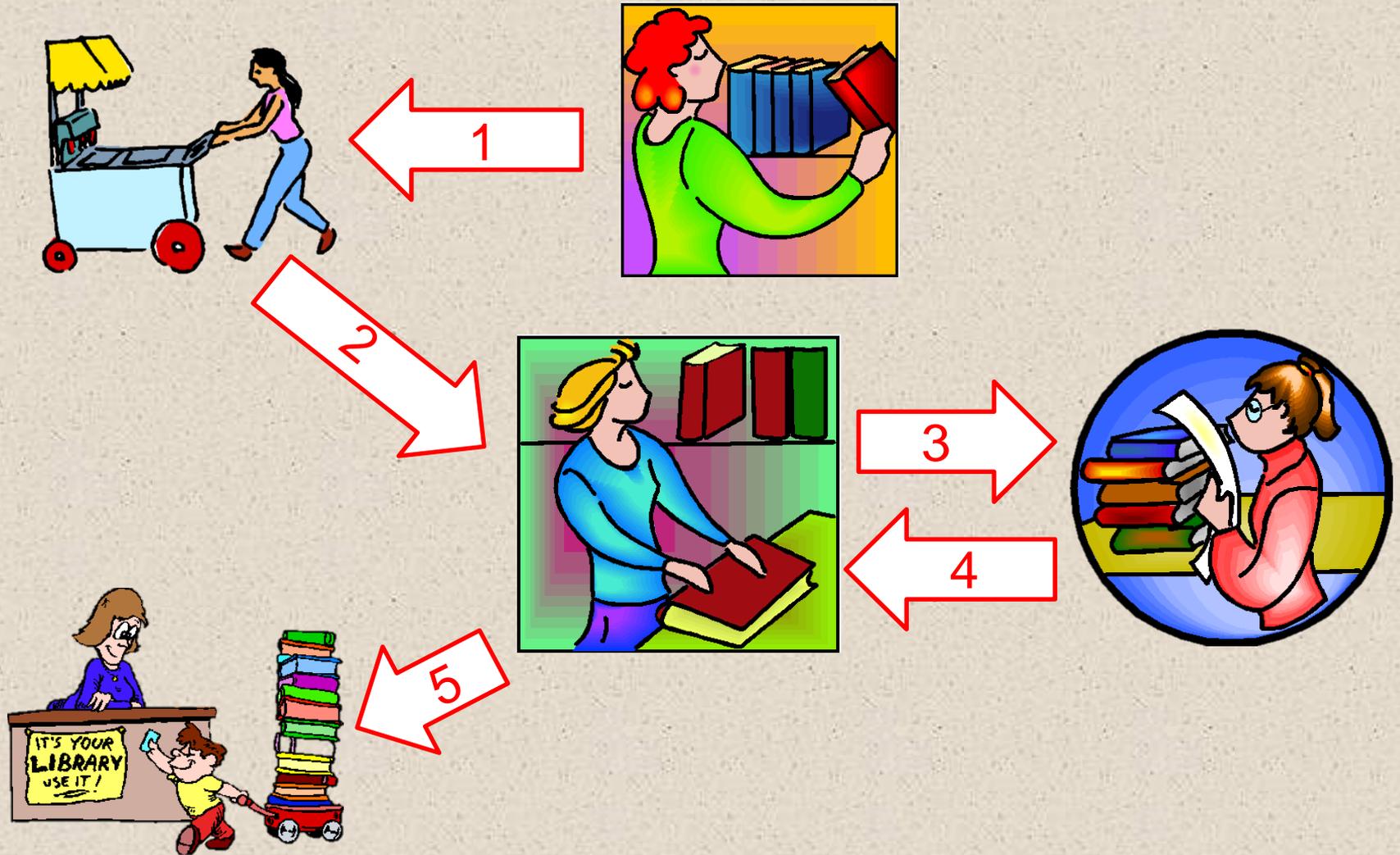
2010-

Service Center





Materials Services





No Outsourcing



approval plans

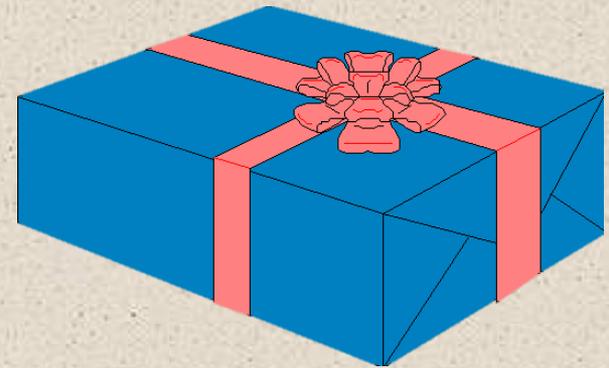
pre-cataloging

batch uploading of records

shelf-ready materials

ILLiad

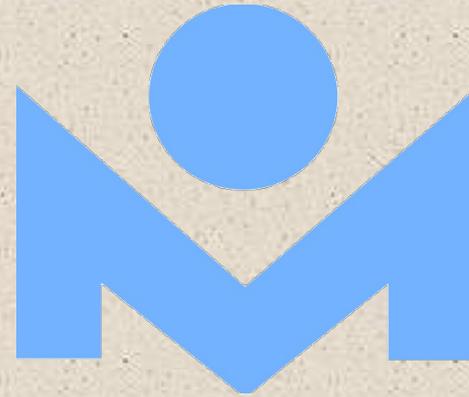
ILL document delivery



Downtown Library

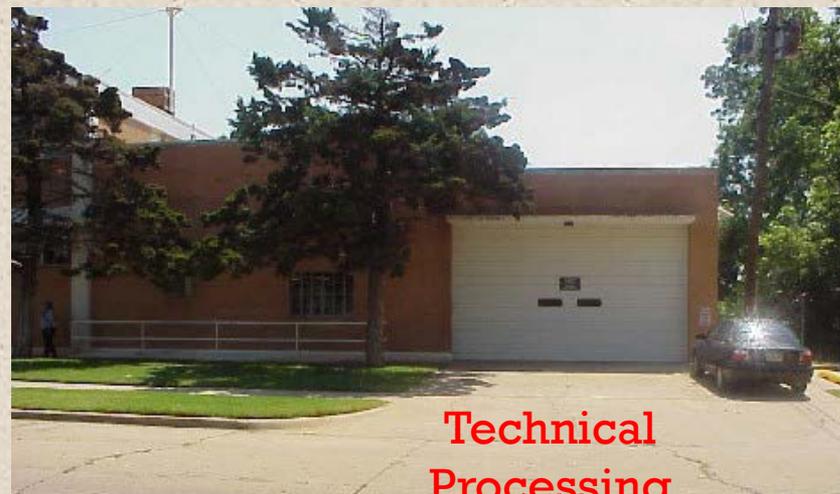


ILL
pre-2010





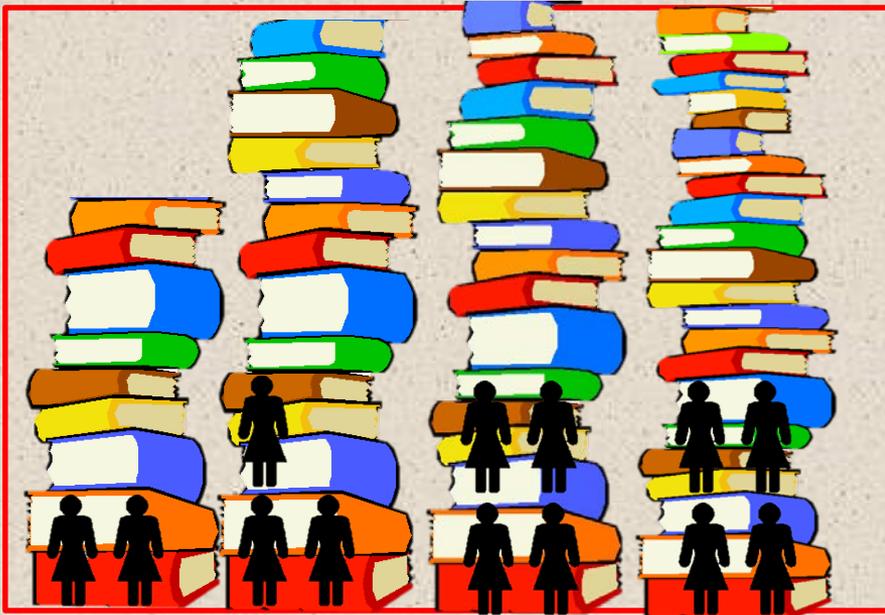
Cataloging



Technical Processing



Major Growth +
Space Limitations +
Staff Limitations =
Workflow Headaches



Tech Proc Manager



CAT/ILL Manager





**Service Center
opened
January 2010**

**Houses
Cataloging
Interlibrary Loan
Technical Processing
Maintenance/Deliveries**





Service Center

Designed without use of consultants

Utilizes industrial technology including RFID sorter

40,000 square feet total

All on one level!



Cataloging

B
e
f
o
r
e



A
f
t
e
r



6/29/2015

18

Technical Processing



B
e
f
o
r
e



A
f
t
e
r



Screenshot of in-house built ILS - 2013

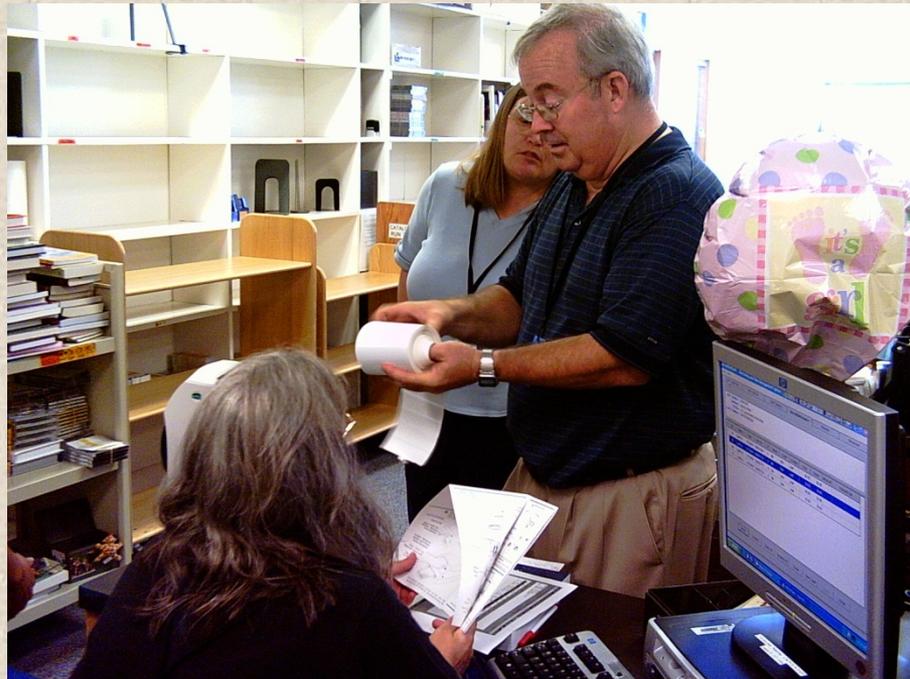
	The girl with the dragon tattoo [electronic resource]	Larsson, Stieg, 1954-2004.	2010	0814/2234
	The girl with the dragon tattoo [large print]	Larsson, Stieg, 1954-2004.	2009	0747/7128
	The girl with the dragon tattoo [sound recording]	Larsson, Stieg, 1954-2004.	2008	0746/3870
	The girl with the dragon tattoo [sound recording] /	Reznor, Trent.	2011	0817/8089
	The girl with the dragon tattoo [videorecording] /		2010	0781/1029
	The girl with the dragon tattoo [videorecording] /		2012	0822/2630
	The girl with the dragon tattoo.	Larsson, Stieg, 1954-2004.	2008	0741/0061
	The girl with the dragon tattoo [electronic resource] /	Larsson, Stieg, 1954-2004.	2008	7001/4642



Original ILS

Designed and coded in-house

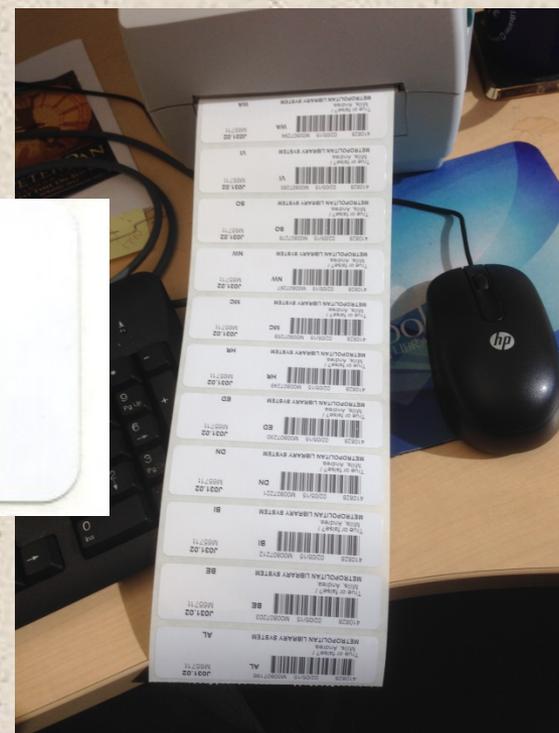
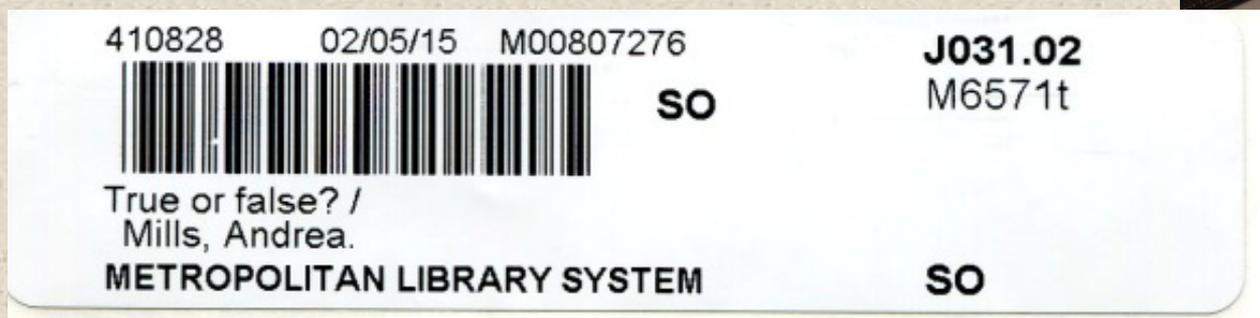
Went live in summer 1985





Barcode/Spine Labels

Labels, including barcode,
printed in Cataloging





Vendor ILS Timeline



June 2012

Software designer announces retirement effective June 2013

July 2012

ILS Task Force determines vendor ILS most effective option for the future

July 2012 – October 2013

ILS selection process



Vendor ILS Timeline

November 2013

ILS vendor selected

January 2014

Contract awarded

February – August 2014

Implementation planning

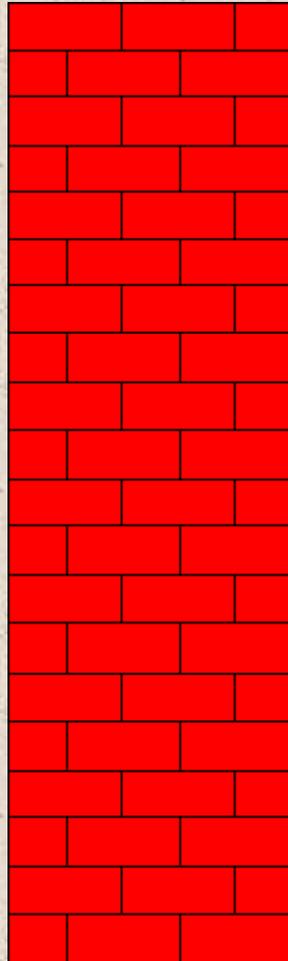
Vendor designs custom software

Training





Vendor ILS Timeline





Vendor ILS Timeline

August 22, 2014

The end of the world as we know it
Catalog frozen

August 30 – September 1, 2014

ILS installation

September 2, 2014

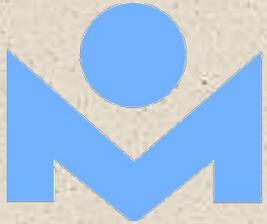
It's a brave new world
We're live!



September – December 2014



Identifying Workflow Issues



Listen and observe

Visit work areas multiple times each day

Listen to conversations (even eavesdrop!)

Look over shoulders

What do you see staff struggling with?

Do you see bottlenecks developing?



Identifying Workflow Issues



Ask questions

What are staff having trouble with?

How are staff feeling about the process?

What is slowing staff down?

What would staff like for you to do?

Always ask this, even if you cannot do what they ask you to do



Identifying Workflow Issues



Pay attention

What are staff telling you?

Do you hear from staff outside your area?

Make sure you understand what you are hearing



Triage



Determine the most essential issues

Address them first

Know your priorities

Anything that kept materials out of users' hands was defcon one

Perform triage every time a new issue arises



Triage



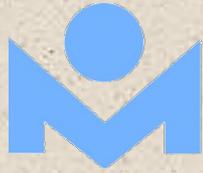
Some issues are somebody else's

Hardware and interfaces are IT's problem



But keep your celebrations to yourself

Show appreciation for whoever has to fix it



Triage



EMERGENCY

Not every issue is a problem

Some are just inconveniences

People may just have to live with them

Some issues are opportunities

Don't be in a rush to fix everything





Solving Workflow Issues



Know what you are trying to accomplish

**Be aware of how others down the line
will be affected**



Solving Workflow Issues



Have your priorities in order (triage)

Don't rush if you don't have to



Solving Workflow Issues



Walk through the entire process as it exists

Pinpoint problem areas and bottlenecks

Come up with possible solutions

Involve the people who are currently doing the task, even if you don't have time for brainstorming sessions



Solving Workflow Issues



Once you have a potential new process

Alpha test

Beta test

Consider having just one person as a beta tester

Don't always use the same person



Solving Workflow Issues



If the solution doesn't work, or doesn't work well...

Try again... and again



Solving Workflow Issues



Think outside the box

Can someone else do part of the task?

Do you really need every feature?



Solving Workflow Issues



Think on your feet

**Remember, it doesn't have to be
perfect**

It does have to work



Solving Workflow Issues



Once you are reasonably sure it works

Write the whole process out, step by step

Train everyone who has to use it

Monitor it

Use the tools you used at the beginning

See if you can make it better



Final Thoughts



In a tough situation

A good relationship with the people you work with is essential

Be honest

If it's a pain, admit it

**If people just have to deal with it anyway, say
SO**



Final Thoughts



In a tough situation

Cut people some slack

Allow some whining or complaining

They don't have to like it, they just have to do it

Have a sense of humor

Sometimes, it's all you've got

Chocolate never hurts!



Visit the Metropolitan
Library System

CATskills





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