

Kyle Banerjee's Getting Ready for the Big Move

by Douglas Wayman

With a potential migration on the horizon, a colleague discovered the Fall 2022 Northern Ohio Technical Services Librarians (NOTSL) meeting “Migration Station: Tips & Tricks to Manage Your Data” and a number of us viewed it. I was particularly impressed by the first of three presentations made during the meeting and chose to evaluate *Getting ready for the big move*, now available on [YouTube](#). Additionally, you can access the [presentation slides](#) from this meeting on their website. The presenter, Kyle Banerjee, who works as Senior Implementation Consultant for EBSCO on the Open Library Foundation (OLF) project FOLIO, gave a two-hour presentation on integrated library system (ILS) migration.

Despite the fact he works for EBSCO, he was very sure to state clearly that he was representing only his own views, albeit a bit late in the presentation. Quick note: for certain viewers, Kyle's seemingly meandering style may be a little disarming, but his slides reveal a discursive thought process that follows the well-worn path of a hands-on, frontline technical practitioner, rather than suave sophisticated showiness; and when push comes to shove, would we not all rather listen to someone who knows the ropes from experience rather than a polished political pundit who has learned about it all second-hand?

With that in mind, after making the case of why anyone should even care about getting ready for migration and revealing his own top-notch credentials, Kyle's first important stop was the analogy of how migrating to a new system is like moving to a new house. As he unpacks this illustration, we see the practical kind of wisdom that Kyle shares over and over again throughout the presentation. It is straightforward, useful, and unapologetic, as he asserts that “you leave something you know intimately for something new and different,” and “the whole point of moving is to change things for the better.” One of the most important changes for the future of library metadata migration is something he mentions in regard to new systems, especially in regard to relationship links in metadata. He stresses the point that there can be problems when “relationship networks break down (and they are hard on the system anyway).”

Going back to the “migration is like moving” analogy, Kyle exhorts attendees to “think about what is important.” In a system migration, there are certain things that *definitely should* be brought over, there are *some that depend* on certain factors, and there are others that are simply “Nope!” about which he later makes the nearly comical, but quotable, assertion, “Do not bring the trash!” Also providing comic relief around the 26-minute mark, we see Kyle's cat for the first time (a good omen for many librarians), but Kyle does not skip a beat, even though librarians in the crowd may have been momentarily distracted by the recognition of a familiar soul.

Kyle carries on with his lists of “definitely,” “it depends,” and “nope!” entries, explaining why each group in the list is worth migrating to a new system. Then he expresses at length some real-life examples of certain things that definitely should not be migrated, like “things that went missing in the 1970s” and “title dumps from subscription databases.” Cutting that particular slide a little short after getting side-tracked by the chat statement that some states do not forgive fines, Kyle moved on to assert: Focus on the big picture!

Douglas Wayman is Unit head of Electronic Resources & Collection Metadata Management at the University of Notre Dame.

Pretty much the rest of the presentation proceeds along these lines. You can view the specific topics in the slide deck that is available at the NOTSL website above. The overarching sections are: Understand why you are migrating, Traps to avoid, Things to do, Specific data issues, and Tools. Each of these sections include many of the same soap-box assertions, memorable quotes, and down-home advice as the first section, with practical application for the situation at hand being first and foremost.

While I generally agree that when the “rubber hits the road” in a migration scenario (I have been through three), having practical guidelines is really what you want, and Kyle delivers that in spades here. The lion’s share of the migration process is very well-addressed. However, things he did not address include the overwhelming issue of training users for the new system and helping prepare for the tsunami of decisions that will be required from folks responsible for the various sections of the new system, who will need to decide things like, “What do you want to name this code or that status?” or “How long are emeritus professors allowed to check out CDs?”

I also think he gets off track when he starts a short diatribe against “pre-coordinated subject headings.” This is not focusing on the big picture, and he should know better (having come from a cataloging background himself), that you do not want to mess with subject analysis, even if you do not like the way that the archaic system is better adapted to card catalogs rather than electronic catalogs and that they are a big pain to migrate. Mainstream tech folks have been complaining about library catalogs and MARC’s uncomfortable relationship with database structures for years, but even Kyle seems to agree that the internal logical structure of MARC records is laudable. I would argue the same for subject headings. Even though they are a pain, it is impressive that these headings are able to transcend the notion of general vs. specific by providing advantageous layers of useful sub-divisions to users (who very likely will still use only single keywords to search anyway).

These are minor points compared to the copious amounts of incredibly useful information imparted in this presentation. I would highly recommend viewing the video with a migration team and then afterward, enjoy employing Kyle’s memorable statements and exhortations like “Do not bring the trash!” and “Just in case stuff’ is not harmless!” and “What libraries think is in their data is different from what is actually there.” Kyle’s experience and wry sense of humor make migration almost seem survivable.