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Standardization Concepts for ILS Migration

Last updated: April 7, 2026

Background

By this time next year, we will be working on a migration project. If we decide to move to a new Integrated Library System (ILS) other than SirsiDynix Symphony WorkFlows, we will need to have migration complete by June 30, 2027. If we decide on an in-place migration with SirsiDynix we will have longer to complete the migration process but should still be finished no later than the second half of 2027.

As we work towards a system migration we are also working on areas of standardization. These two projects will go hand in hand so that the migration is as smooth as possible and so that rules are in place to make that new system easier to understand and simpler to administrate. The current Symphony system went live almost 20 years ago and was designed at a time when there was little consensus among member libraries about the way that materials should be circulated to patrons and there were tighter constraints on what Symphony could do.

In the intervening two decades several trends have developed in the library world to build something of an unplanned consensus:

- In RSA, 128 of our libraries have gone fine free, meaning there are many fewer fine/bill rules required.
- Libraries have often standardized their own circulation rules so that there are fewer rules at each library for things like books, DVDs, Blu-rays, and periodicals. Fewer libraries have different circulation limits for different types of patrons or for different types of material.
- These moves towards simplification of circulation rules and not charging overdue fines were accelerated by the COVID-19 pandemic as libraries sought to make things easier for their staff and patrons.
- In the last 18 months RSA staff have also been implementing autorenewals for 58 libraries. We set limits of a total of 6 weeks for checkout and renewals for items to be covered by autorenewals. All of this means that there are now 37 identical circulation rules in the circ map which can be replaced by one single rule in a new system.

Standardization gives us the perfect opportunity to design the next system in a way that is easier to manage by RSA staff and to understand by staff at member libraries, which will ultimately improve the patron experience.

Design Fundamentals

In developing the design for the elements of the new database I have followed these fundamental principles.

1. The design language must be system neutral
 - Examples are based on Symphony constraints, but the overall principles should apply in the event we migrate to a different vendor
2. Codes should be human readable
 - Codes should be designed consistently to allow RSA staff and others to easily interpret them

- When abbreviating codes such as Library System Codes to fit digit constraints vowels are cut first as this leaves the abbreviated code human readable
3. Ensuring a future proof design where possible
- Codes should be designed to allow for addition of library branches, new circulation rules, new item types, and so on
 - No design can be future proofed against a library changing its name

Library System Codes

The first candidate for redesign is the System Codes in no small part because they were one of the easiest to work on. These codes have been developed using the Design Fundamentals listed above. Another consideration is that when the current Symphony database was developed the decision was made to use the two-digit codes used in the previous CarIX system as a kind of prefix to the ten-digit system code. In a new system we would no longer need to follow that strict rule. The other major consideration we need to address in designing the new codes is to clearly distinguish school libraries from publics in the hopes of ameliorating the large number of items which get sent to school libraries in error.

In the example shown in Figure 1, Peoria Public Library’s branches are numbered 1-6. PEORIA0 refers to the library group to which all the branches belong. If Peoria Heights were to open a new branch it would receive the code PHEIGHTS2. While this might be unlikely, it is much more likely they might obtain lockers, which if they “own” items would need to be set up as a pseudo-branch. By dropping “-PL” in RUSHVIL-PL RUSHVILLE1 is easier to read. And by prefixing the school codes with “S_” it is easy to determine that this library is a school. To keep to ten digits, we drop the vowel “o” from the name Abingdon but “S_ABINGDN2” is still easy to read.

Figure 1: Sample of new system codes

Current System Code	Proposed New System Code	Length	Description
P0-ALL	PEORIA0	7	Peoria Public Library - Group
P0_MAIN-ST	PEORIA1	7	Peoria Public Library - Main Street Branch
P1_LVIEW	PEORIA2	7	Peoria Public Library - Lakeview Branch
P2_LINCOLN	PEORIA3	7	Peoria Public Library - Lincoln Branch
P3_MCLURE	PEORIA4	7	Peoria Public Library - McClure Branch
P8_NORTH	PEORIA5	7	Peoria Public Library - North Branch
P7_OUT	PEORIA6	7	Peoria Public Library - Outreach
PHEIGHTS	PHEIGHTS1	9	Peoria Heights Public Library
PITTSFIELD	PITTSFILD1	10	Pittsfield Public Library District
RANSOM-MEM	RANSOM1	7	Ransom Memorial Public Library
RUSHVIL-PL	RUSHVILLE1	10	Rushville Public Library
AB-ALL	S_ABINGDN0	10	Abingdon - Avon District 276 - Group
ABINGDN-HS	S_ABINGDN1	10	Abingdon-Avon CUSD #276 - High School

AB2NGDN-GS	S_ABINGDN2	10	Abingdon-Avon CUSD #276 - Hedding Grade School
AVON-CUSD	S_ABINGDN3	10	Abingdon-Avon CUSD #276 - Middle Elementary School
A0_A-C-HS	S_AC_CENT1	10	A-C Central CUSD #262 - Middle/High School

Item Types

There are currently 192 item types in Symphony, including just 64 for Books. Historically Item Types were created to solve various problems with the large number of ways libraries wanted to circulate their items because the item-owning or circulating library, Item Types, and User Profiles are the only three elements Symphony considers when deciding if a circulation can happen or a hold can be placed. In addition, Item Types were created to describe both what the item is and how long it can circulate.

I am proposing that we develop a simpler set of Item Types which are more generic and flexible. In the example in Figure 2, there would be several generic Book Item Types to accommodate the various needs of member libraries as well as some item types designed for specific purposes such as for limiting items to local holds only or to make them non-circulating such as for reference or special collections. A set of these Item Types would be available for Books, Periodicals, DVDs, Blu-rays, Audiobooks, Interlibrary loan items, Realia, and other broad categories. These broad categories would ideally be mapped to format icons in the OPAC discovery layer.

We would also move away from any reliance on item types to tell library staff and patrons as to where to find items in your library. Instead, we would rely on Home Locations, which would not be restricted, as well as reliable call numbers implemented by staff at member libraries.

Figure 2: Suggested Item Type example

ITEM CAT 3	ITEM TYPE	LENGTH	Description
BOOK	BOOK-01	7	Generic
BOOK	BOOK-02	7	Generic
BOOK	BOOK-03	7	Generic
BOOK	BOOK-04	7	Generic
BOOK	BOOK-05	7	Generic
BOOK	BOOK-06	7	Generic
BOOK	BOOK-07	7	Generic
BOOK	BOOK-08	7	Generic
BOOK	BOOK-09	7	Generic
BOOK	BOOK-10	7	Generic
BOOK	BOOK-LH	7	Local Holds only
BOOK	BOOK-NC	7	Non-Circ
BOOK	BOOK-NWH	8	New Holdable
BOOK	BOOK-NWL	8	New Local Holds only
BOOK	BOOK-NWN	8	New Non Holdable
BOOK	BOOK-SP	7	Special

Circulation Rules

As mentioned above, part of the design fundamentals is that codes should be human readable. While circulation rules are not visible to staff at member libraries, I thought it would be useful to show how rule names might be designed to make system administrative tasks easier and more efficient for RSA staff.

Figure 3 shows examples of some Circulation Rules and how we might name them. The first 4 rules listed here show 14-day circulation periods in a fine free library (the leading FF designates fine free) with renewal limits of 0 to 3 with unlimited charges allowed. The next two show 21-day circulation periods, and the last would be for items that don't circulate. The naming convention shown in this example is based on the 10-digit maximum allowed in Symphony but could be rethought and adapted should we migrate to a different ILS with different constraints.

Figure 3: Suggested Circulation Rules format

Name	Period	Max Fee	Overdue Fee	Chargeable	Renewal Limit	Grace Period	Grace Type	Max Charges
FF_14_0_U	14	0	0	Y	0	0	DAYS	25000
FF_14_1_U	14	0	0	Y	1	0	DAYS	25000
FF_14_2_U	14	0	0	Y	2	0	DAYS	25000
FF_14_3_U	14	0	0	Y	3	0	DAYS	25000
FF_21_2_U	21	0	0	Y	2	0	DAYS	25000
FF_21_3_U	21	0	0	Y	3	0	DAYS	25000
NONCIRC	NON-CIRC	0	0	N	0	0	DAYS	0

What's next?

In time for the next Directors Advisory Committee (DAC) meeting in July, I will have designed a concept for naming and organizing Bill Rules and how those bill rules can be reflected in the naming convention for circulation rules which are not fine free. Also, I will be ready to present potential methods for standardization of User Profiles.

Later this year RSA staff will take an environmental scan to see what other ILS systems are available and might meet RSA's complex needs and financial constraints. SirsiDynix and other interested vendors will be invited to provide demonstrations of their products.

What can we do?

If you are Director or their designee, I would encourage you to attend the DAC in July to see my progress designing a naming convention for bills and other developments to the work already done. Details of DAC meetings can be found [here](#).

When you receive emails inviting you to take part in surveys and polls regarding this project, please take the time to complete the surveys. We really do welcome your input.

I would also encourage you to contact me at antony.deter@librariesofrsa.org if you have any suggestions, concerns, or questions with standardization and migration. Email also for a copy of this document. It will also be available [here](#).