

MIGRATION TO THE KOHA OPEN SOURCE LMS: THE DBS LIBRARY EXPERIENCE

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Caveat

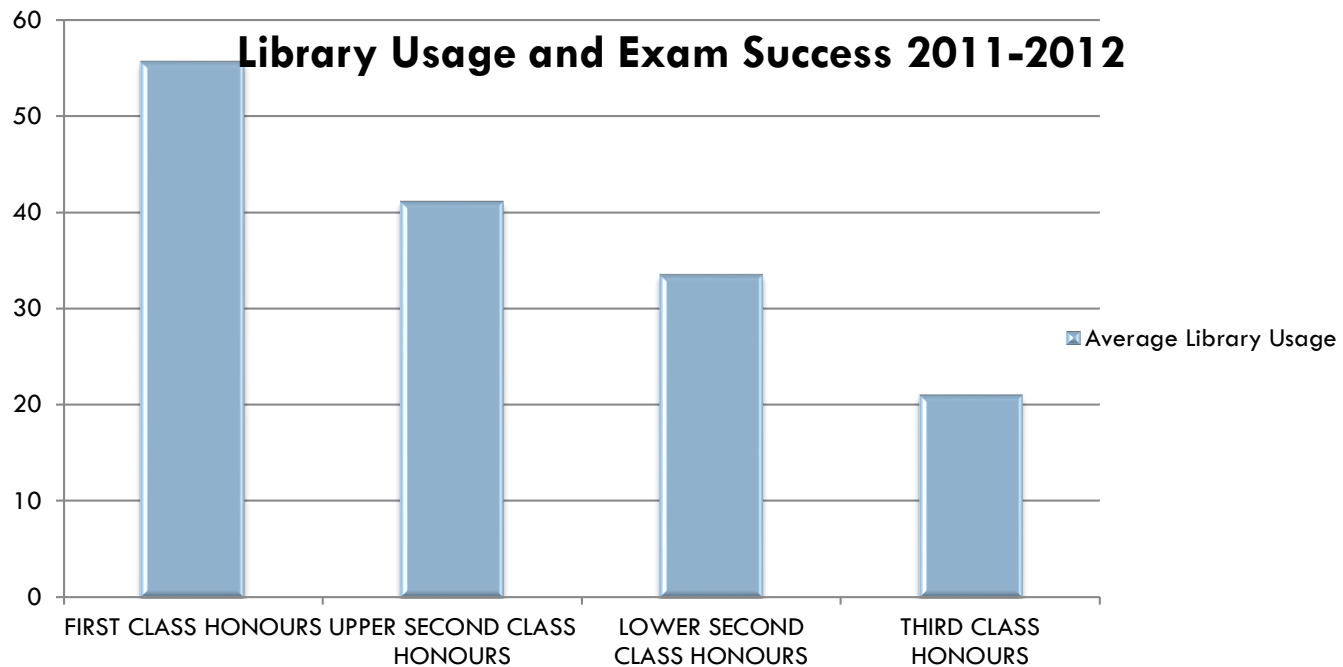
“What Kabir talks of is only what he has lived through. If you have not lived through something, it's not true.”

Kabir (Indian Mystic & Poet)

c. 1440–c. 1518

The importance of the LMS

Data! Data! Data!





The Importance of the LMS

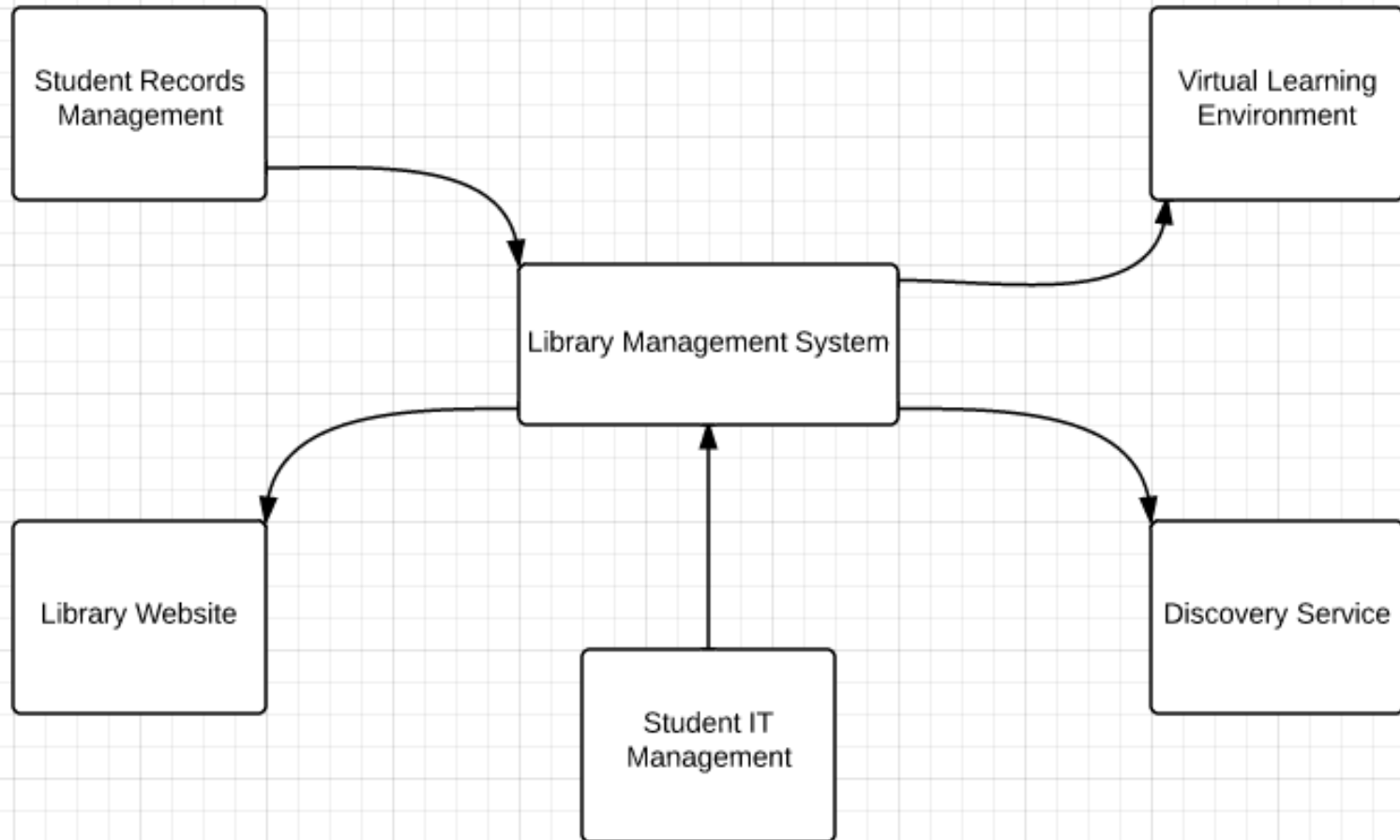
Can be main IT interface for

Staff (desktop)

Users (OPAC)

At the heart of library things

LMS Connections





March 2013

Using Heritage (ISOxford) 4.2.9


Variety of users

Core system/optional modules


Separate OPAC

Main menu

 **1. Cataloguing menu**

 **2. Circulation menu**

 **3. Acquisitions menu**

 **4. Serials menu**

 **5. Enquiry menu**

 **6. Reports menu**

 **7. Management menu**

CHARLES K. FELDMAN
GROUP PRODUCTIONS PRESENTS

the seven year itch

starring

Marilyn Monroe

and

Tom Ewell

A **CINEMASCOPE** PICTURE

Released by 20th CENTURY FOX

COLOR BY DE LUXE

with EVELYN KEYES · SONNY TUFTS · ROBERT STRAUSS · OSCAR HOMOLKA · MARGUERITE CHAPMAN · VICTOR MOORE · BOCKANE

Produced by CHARLES K. FELDMAN · Screenplay by ROBERT ROY POOL · Directed by BILLY WILDER

EDITED BY BILLY WILDER · COSTUME DESIGNER BILLY WILDER · PRODUCTION DESIGNER GEORGE AXELROD





The ~~Seven~~ Eleven-Year Itch

Windows 7 compatibility

Management

“Semi-retirement” of Heritage 4.2

HERITAGE CIRQA ONLINE

Search | Guided Search | Login | Circulation | History | Clear Session

Session is Busy

The server is busy servicing your previous request, please select back and try again.

[Back](#)



Interleaf News

Koha Version 3.16 Released
27/05/2014

Interleaf Technology and OverDrive introduce Leabharlann: an affordable eBook service for Irish Secondary Schools
19/05/2014

Print from any mobile device to the library printer
15/05/2014

Open Source News

Koha Version 3.16 Released
27/05/2014

Belfast Metropolitan College chooses Koha, supported by Interleaf Technology and PTFS-Europe
09/05/2014

Oslo Public Library chooses Koha LMS
25/04/2014

Interleaf Technology

Interleaf Technology provides technology solutions for libraries of all sizes. It is the only company providing these services with an Irish-based support team. Interleaf addresses all library technology needs from Library Management Systems to Wi-Fi, eBooks and RFID security services.

We partner with leading industry providers as well as developing our own products. If you are looking for a technology solution for your library, **contact** Interleaf today.



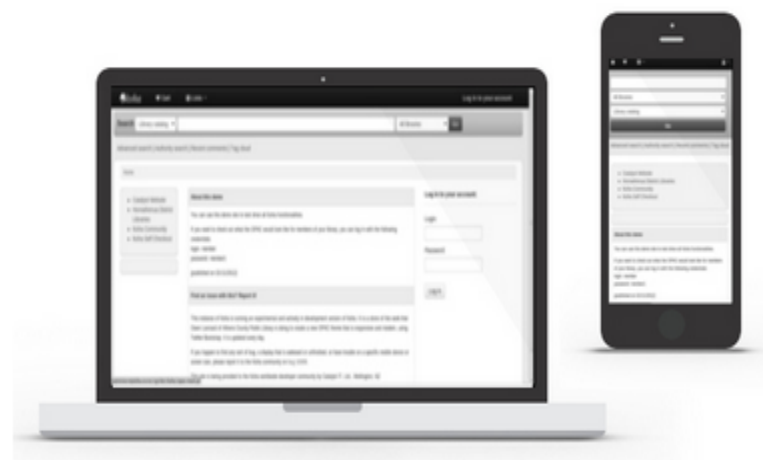
Koha Library Software

The world's first free and open source library system

Koha is a fully featured, scalable library management system. Development is sponsored by libraries of varying types and sizes, volunteers, and support companies worldwide.

Introducing Koha 3.16

[Try it now](#)



Open Source

“Open source software is software that can be **freely used**, changed, and shared (in modified or unmodified form) by anyone. Open source software is made by many people, and distributed under licenses that comply with the Open Source Definition.”

Open Source Initiative <http://opensource.org/>

Open Source Software in the Library

	Library Management System
	Web content management system
	Discovery system
	Library guides
	ERM suite
	Citation management
	Online digital curation
	Reading list software
	Institutional repository

April/May/June 2013

Live Demonstration of Koha

Online Demo Installations

Staff Meetings

Quote(s) from Interleaf

Haggling!



April/May/June 2013

Decision time: Yes to Koha!

Why?

“Reference interviews”

Serials?

Acquisitions?

Catalogue Data

ONE DOES NOT SIMPLY IMPORT



ONE'S CATALOGUE DATA INTO KOHA



Issues

Heritage catalogue data:

done by committee

no standards/AACR2

not really MARC friendly

quotation marks/carriage returns

ampersands

notes



Conversion to MARC

Authorised values e.g.

100e author role

245h media types

856z URL note

Cataloguing templates

003 MARC organisation code [Library of Congress]



July 2013

- 10 Edit Heritage Catalogue Data
- 20 Export Catalogue Data (CSV)
- 30 Edit Heritage Catalogue Data (CSV)
- 40 Send Catalogue Data to Interleaf
- 50 Receive Catalogue Data (MARC)
- 60 Examine Catalogue Data (MARC)
- 70 GOTO 10

August 2013



Koha Server

Loading of catalogue records

Administrative parameters

- Libraries

- Item Types

- Patron Categories

- Circulation/Fine Rules

Reader Records



Reader Records

Export CSV file from Heritage

Data editing (e.g., quotations marks/carriage returns)

Field mapping

Patron Attributes

Liabilities/Blocking

Import to Koha: Patron import tool



September 2013

Circulation/Fine History

Configuration settings (“Global System Parameters”)

RFID software

Staff training/testing

Live Koha (issues only)

Loan data transfer



Loan Data Transfer

Koha Offline Circulation module



Enter patron card number or partial name:

Submit

Check out

Check in

Search the catalog

Circulation

- [Check out](#)
- [Check in](#)
- [Transfer](#)

Offline circulation

- [Upload offline circulation file \(.koc\)](#)
- [Pending offline circulation actions](#)
 - [Get desktop application](#)
 - [Get Firefox add-on](#)

Circulation Reports

- [Holds queue](#)
- [Holds to pull](#)
- [Holds awaiting pickup](#)
- [Hold ratios](#)
- [Transfers to receive](#)
- [Overdues](#) - **Warning:** This report is very resource intensive on systems with large numbers of overdue items.
- [Overdues with fines](#) - Limited to your library. See report help for other details.



Loan Data Transfer

Koha Offline Circulation module

create file

examine format

Heritage Report – current loans

Edit Heritage report

Create ‘fake’ offline circulation file

Upload to Koha

September 2013

Switch off Heritage (except for ordering)

Switch off Heritage OPAC

Change all OPAC links Heritage to Koha

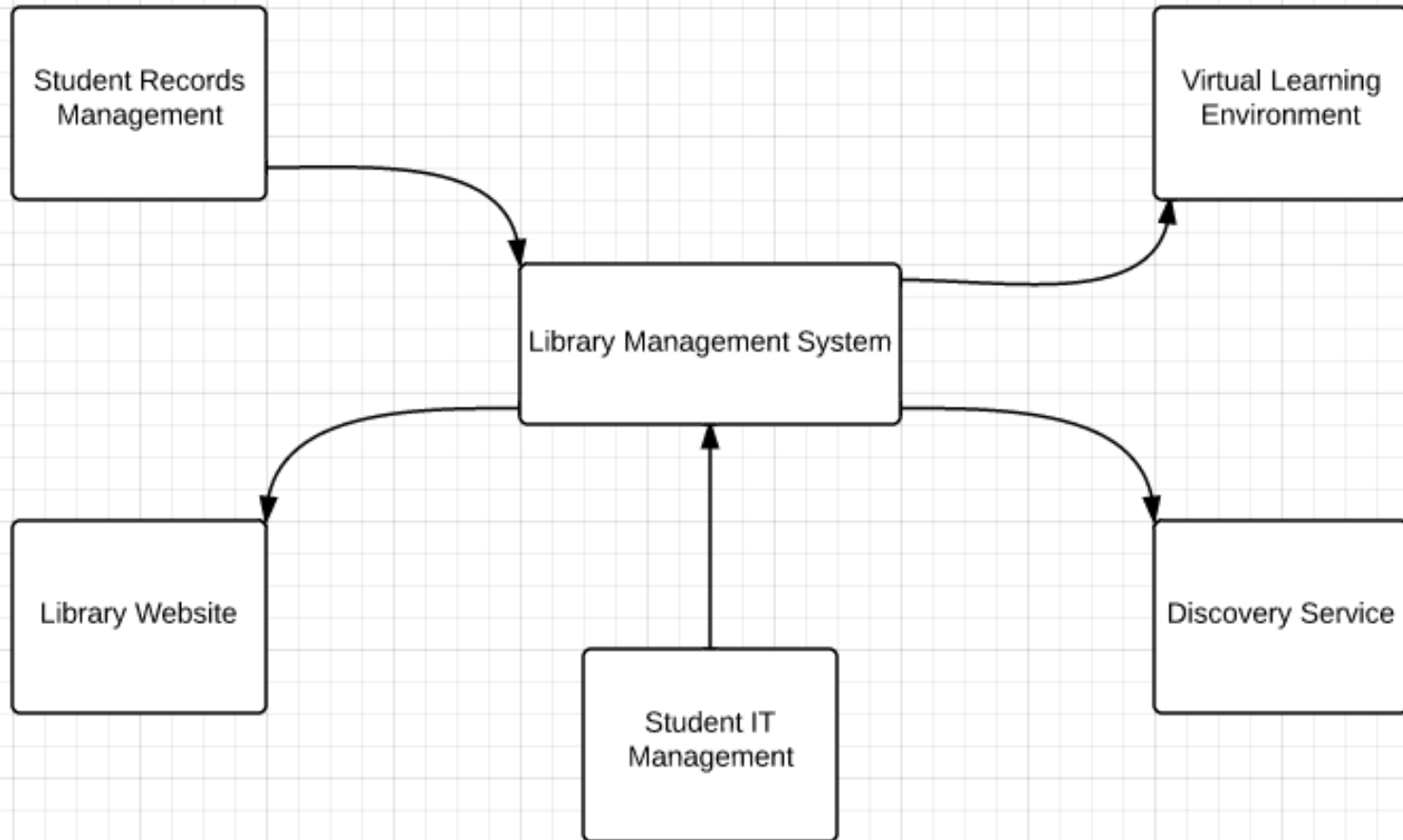
Register <http://koha.dbs.ie>

Self Service Stations

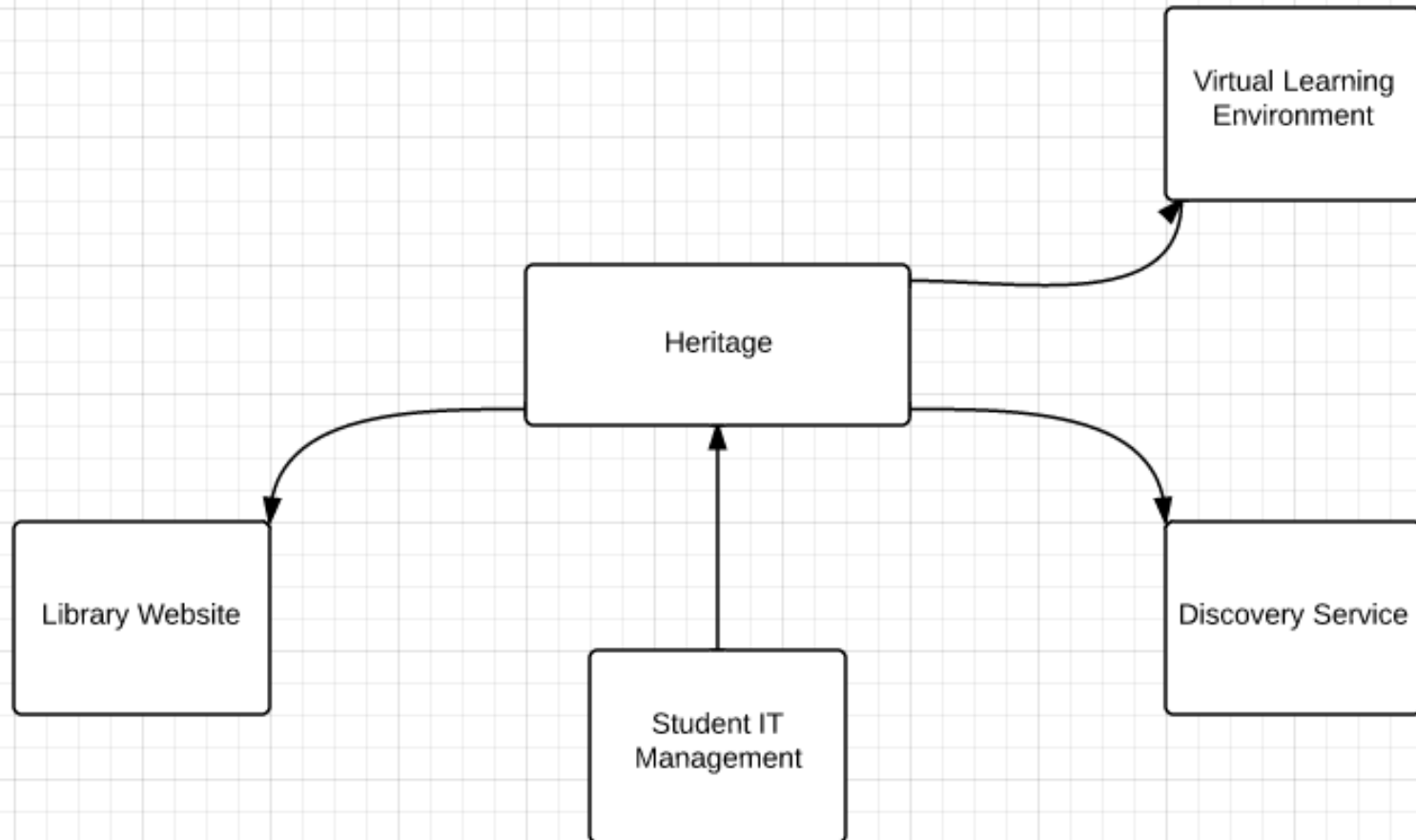
Live Koha (everything except ordering)

Connections?

Connections

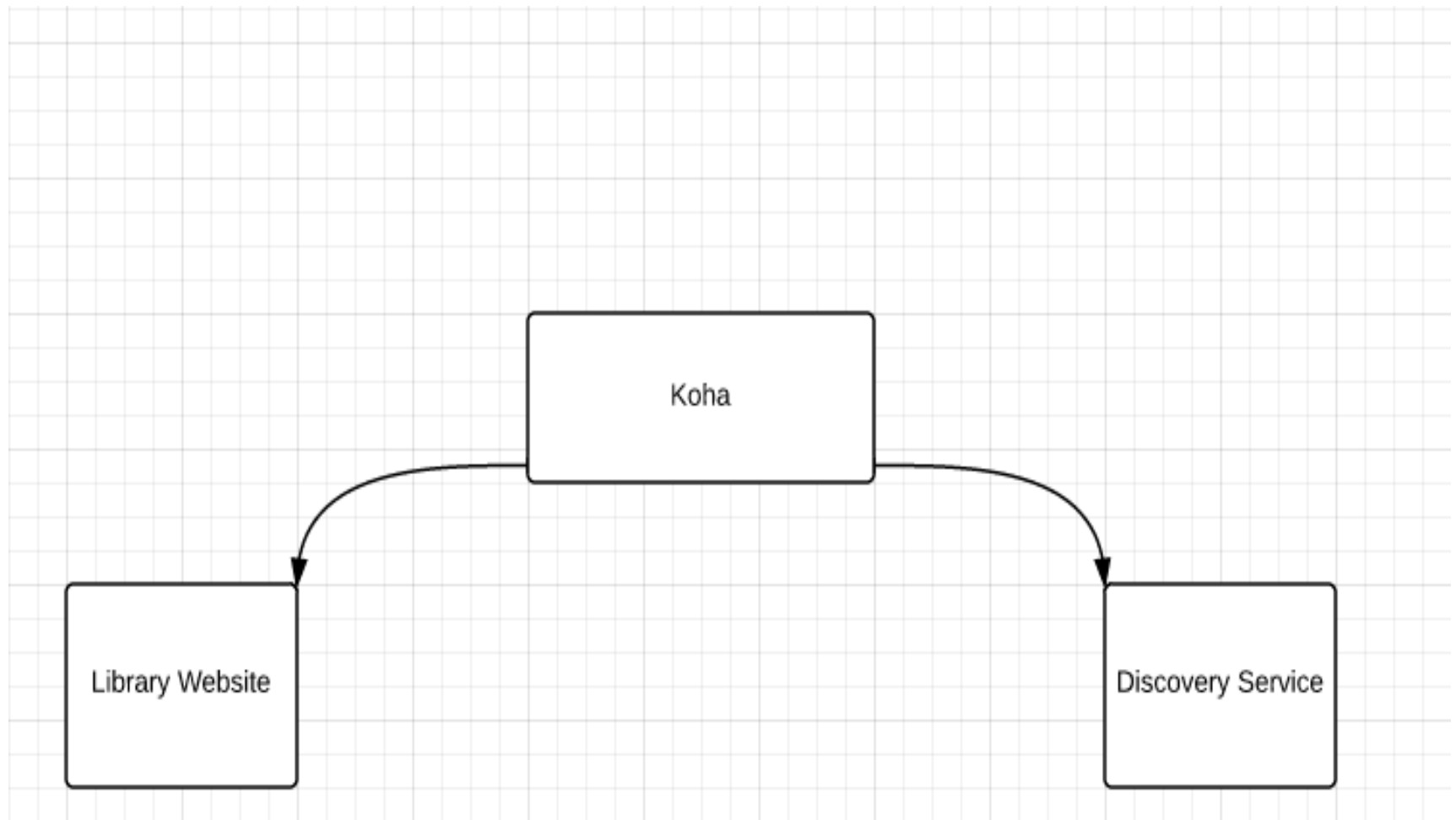


Connections - Heritage





Connections - Koha





January 2014

Create Budgets

Start Acquisitions

Archive data from Heritage server

Retire Heritage server



Outstanding Issues

Catalogue

- Data in wrong fields

- Ampersands/special characters

- 10-digit ISBNs

Self service station bugs

Reporting

Hold (reservation) management

Holds Management

Save all Circulation preferences

▼ Holds Policy

Preference	Value
AllowHoldDateInFuture	Don't allow ▼ hold requests to be placed that do not enter the waiting list until a certain future date.
AllowHoldPolicyOverride	Allow ▼ staff to override hold policies when placing holds.
AllowHoldsOnDamagedItems	Allow ▼ hold requests to be placed on damaged items.
AllowHoldsOnPatronsPossessions	Don't allow ▼ a patron to place a hold on a record where the patron already has one or more items attached to that record checked out.
AllowOnShelfHolds	Don't allow ▼ hold requests to be placed on items that are not checked out.
AutoResumeSuspendedHolds	Allow ▼ suspended holds to be automatically resumed by a set date.
canreservefromotherbranches	Don't allow (with independent branches) ▼ a user from one library to place a hold on an item from another library
decreaseLoanHighHolds	Don't enable ▼ the reduction of loan period to <input type="text"/> days for items with more than <input type="text"/> holds.
decreaseLoanHighHoldsDuration	
decreaseLoanHighHoldsValue	
DisplayMultiPlaceHold	Don't enable ▼ the ability to place holds on multiple biblio from the search results
emailLibrarianWhenHoldIsPlaced	Don't enable ▼ sending an email to the Koha administrator email address whenever a hold request is placed.
ExpireReservesMaxPickUpDelay	Don't allow ▼ holds to expire automatically if they have not been picked by within the time period specified in ReservesMaxPickUpDelay
ExpireReservesMaxPickUpDelayCharge	If using ExpireReservesMaxPickUpDelay, charge a borrower who allows his or her waiting hold to expire a fee of <input type="text"/>
maxreserves	Patrons can only have <input type="text"/> holds at once.
OPACAllowHoldDateInFuture	Don't allow ▼ patrons to place holds that don't enter the waiting list until a certain future date. (AllowHoldDateInFuture must also be enabled).
OPACAllowUserToChooseBranch	Don't allow ▼ a user to choose the library to pick up a hold from

Holdings Management



Marketing : an introduction

by [Armstrong, Gary \[Author\]](#); [Kotler, Philip \[Author\]](#).

Publisher: Harlow [Pearson Education](#) 2013

Edition: 11th ed.

Description: Pbk. ; [648] p.

ISBN: 0273767186; 9780273767183.

Subject(s): [Marketing Management](#) | [Marketing Mix](#) | [Marketing Strategy](#) | [Marketing Environment](#) | [Consumer Behaviour](#) | [Online Marketing](#) | [Sustainable Marketing](#) | [Marketing Channels](#) | [Marketing Communications](#) | [Marketing](#)

Course(s): [MKR161 Introduction to Marketing Principles \(MKR161\) \(B6MK009\)](#) | [MK2610 Applied Marketing Practice \(MK2610\) \(B6MK002\)](#) | [MAPR01 Marketing Theory & Practice \(MAPR01\) \(B0MA001\)](#) | [DBS202 Marketing Principles \(DBS202\) \(B0BS004\)](#) | [B6MK100 Marketing Essentials \(B6MK100\)](#) | [MK1610 Introduction to Marketing \(MK1610\) \(B6MK001\)](#) | [MK194 Marketing Principles \(MK194\) \(B6MK016\)](#)

Core/Supp/View: [CORE](#)

Summary: This text introduces marketing through the lens of creating value for customers. Today's marketing is about creating customer value and building profitable customer relationships. With engaging real-world examples and information, Marketing: An Introduction shows students how customer value-creating it and capturing it-drives every effective marketing strategy.

Tags from this library:

No tags from this library for this title.

[Add](#)

average rating: 0.0 (0 votes)

Holdings (8)

Title notes

Editions

Item type	Location	Collection	Call number	Status	Date due
Reference only	Aungier Street	Aungier Street Reference	658.8 ARM (Browse shelf)	Not for loan	
1 Week Loan	Aungier Street	Aungier Street Main Lending	658.8 ARM (Browse shelf)	Available	
1 Week Loan	Aungier Street	Aungier Street Main Lending	658.8 ARM (Browse shelf)	Available	
1 Week Loan	Aungier Street	Aungier Street Main Lending	658.8 ARM (Browse shelf)	Available	
1 Week Loan	Aungier Street	Aungier Street Main Lending	658.8 ARM (Browse shelf)	Available	
1 Week Loan	Aungier Street	Aungier Street Main Lending	658.8 ARM (Browse shelf)	Checked out	15/04/2014
1 Week Loan	Dame Street	Dame Street Main Collection	658.8 ARM (Browse shelf)	Available	
1 Week Loan	Dame Street	Dame Street Main Collection	658.8 ARM (Browse shelf)	Available	


Browsing Aungier Street Shelves , Collection code: Aungier Street Main Lending



IT'S NOT A BUG

IT'S A FEATURE

Heritage is better!



IV Editor - [RDRLOANS]

File name: RDRLOANS Record ID: 88140 Lines: 13 Size: 134

Record

```
9
0
1

34550||34015||35953||47245||44251||35074||68355||4203||99011071

16788
16740*0003

900
4000
15345*0001||15506*0009||15730*0152
0
```

1 : 1 Word-wrap mode



Heritage is better! (staff edition)

“Just not enough information I would really want on this page [Circulation History]”

“the fine form is not comprehensive enough in order to adequately explain fine histories to students”

“Some info on Heritage was easier to find”



Heritage is better? (user edition)





Koha is better! (staff edition)

“very click friendly”

“More stable [than Heritage]”

“love that it’s web-based; I can access [staff] Koha from home”

“Patron Attributes are really handy”

“More exciting OPAC interface”

“hated Heritage with a passion”

“Koha rarely crashes”

“intuitive to use”

“Koha likes puppy dogs and rainbows and cooks an awesome curry”



Koha is better? (user edition)

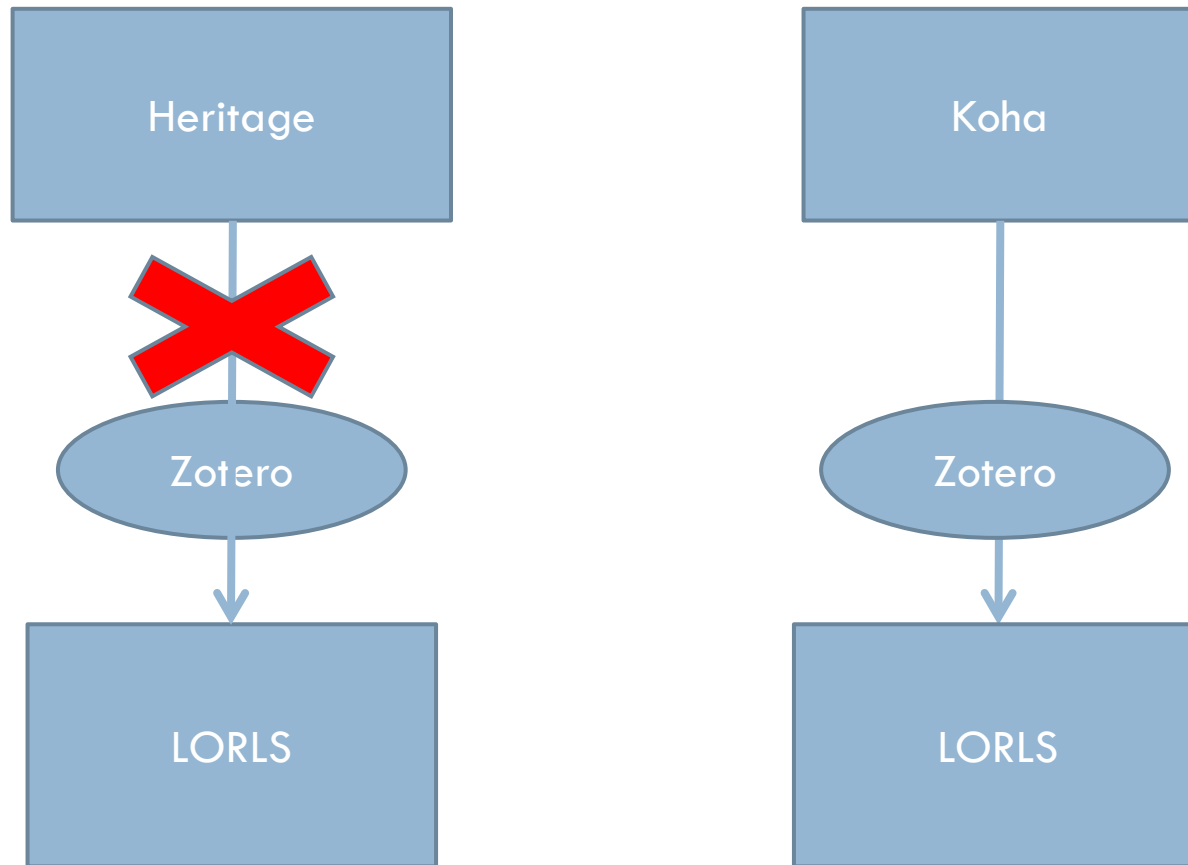




Koha is better! (cost edition)

Koha External Hosting & Support	€X
Koha One-off Setup Costs	€2X
Heritage Support	€2X
Heritage External Hosting & Support	€4X

Koha is better! (interactivity edition)



The End

Thank You!

Questions?

Comments?

david.hughes@dbs.ie

<http://twitter.com/usernameerror>