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

David Hughes
Systems Librarian
Dublin Business School
“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!

![Bar chart showing library usage and exam success 2011-2012](chart.png)
The Importance of the LMS

Can be main IT interface for

Staff (desktop)

Users (OPAC)

At the heart of library things
LMS Connections

- Student Records Management
- Virtual Learning Environment
- Library Management System
- Library Website
- Discovery Service
- Student IT Management
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
The Seven Eleven-Year Itch

Windows 7 compatibility
Management
“Semi-retirement” of Heritage 4.2
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 Software in the Library

<table>
<thead>
<tr>
<th>Software</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Koha</strong></td>
<td>Library Management System</td>
</tr>
<tr>
<td><strong>Drupal</strong></td>
<td>Web content management system</td>
</tr>
<tr>
<td><strong>Vufind</strong></td>
<td>Discovery system</td>
</tr>
<tr>
<td><strong>SubjectsPlus</strong></td>
<td>Library guides</td>
</tr>
<tr>
<td><strong>Cufts</strong></td>
<td>ERM suite</td>
</tr>
<tr>
<td><strong>Zotero</strong></td>
<td>Citation management</td>
</tr>
<tr>
<td><strong>Omeka</strong></td>
<td>Online digital curation</td>
</tr>
<tr>
<td><strong>LORLS</strong></td>
<td>Reading list software</td>
</tr>
<tr>
<td><strong>DSpace</strong></td>
<td>Institutional repository</td>
</tr>
</tbody>
</table>
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
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

- Student Records Management
- Virtual Learning Environment
- Library Management System
- Library Website
- Discovery Service
- Student IT Management
Connections - Heritage

- Virtual Learning Environment
- Library Website
- Student IT Management
- Discovery Service
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 Policy

<table>
<thead>
<tr>
<th>Preference</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AllowHoldDateInFuture</td>
<td>Don't allow ▼ hold requests to be placed that do not enter the waiting list until a certain future date.</td>
</tr>
<tr>
<td>AllowHoldPolicyOverride</td>
<td>Allow ▼ staff to override hold policies when placing holds.</td>
</tr>
<tr>
<td>AllowHoldsOnDamagedItems</td>
<td>Allow ▼ hold requests to be placed on damaged items.</td>
</tr>
<tr>
<td>AllowHoldsOnPatronsPossessions</td>
<td>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.</td>
</tr>
<tr>
<td>AllowOnShelfHolds</td>
<td>Don't allow ▼ hold requests to be placed on items that are not checked out.</td>
</tr>
<tr>
<td>AutoResumeSuspendedHolds</td>
<td>Allow ▼ suspended holds to be automatically resumed by a set date.</td>
</tr>
<tr>
<td>canreservefromotherbranch</td>
<td>Don't allow (with independent branches) ▼ a user from one library to place a hold on an item from another library.</td>
</tr>
<tr>
<td>decreaseLoanHighHolds</td>
<td>Don't enable ▼ the reduction of loan period to ___ days for items with more than ___ holds.</td>
</tr>
<tr>
<td>decreaseLoanHighHoldsDuration</td>
<td></td>
</tr>
<tr>
<td>decreaseLoanHighHoldsValue</td>
<td></td>
</tr>
<tr>
<td>DisplayMultiPlaceHold</td>
<td>Don't enable ▼ the ability to place holds on multiple biblio from the search results.</td>
</tr>
<tr>
<td>emailLibrarianWhenHoldIsPlaced</td>
<td>Don't enable ▼ sending an email to the Koha administrator email address whenever a hold request is placed.</td>
</tr>
<tr>
<td>ExpireReservesMaxPickUpDelay</td>
<td>Don't allow ▼ holds to expire automatically if they have not been picked by within the time period specified in ReservesMaxPickUpDelay.</td>
</tr>
<tr>
<td>ExpireReservesMaxPickUpDelayChar</td>
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<tr>
<td>maxreserves</td>
<td>Patrons can only have 5 holds at once.</td>
</tr>
<tr>
<td>OPACAllowHoldDateInFuture</td>
<td>Don't allow ▼ patrons to place holds that don't enter the waiting list until a certain future date. (AllowHoldDateInFuture must also be enabled).</td>
</tr>
<tr>
<td>OPACAllowHoldToChooseBranch</td>
<td>Don't allow ▼ in your to choose the library to pick up a hold from.</td>
</tr>
</tbody>
</table>
Marketing : an introduction

by Armstrong, Gary [Author] ; Kotler, Philip [Author].

Publisher: Harlow Pearson Education 2013.
Description: Pbk. : [848] p.

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

Course(s): MCR101 Introduction to Marketing Principles (MCR101) (B0MK009) | MCR210 Applied Marketing Practice (MCR210) (B0MK003) | MAP101 Marketing Theory & Practice (MAP101) (B0M1001) | DBS202 Marketing Principles (DBS202) (B0B5004) | B0MK100 Marketing Essentials (B0MK100) | MK1010 Introduction to Marketing (MK1010) (B0MK003) | MK104 Marketing Principles (MK104) (B0MK015)

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.

average rating: 0.0 (0 votes)

** Holdings (8) **

<table>
<thead>
<tr>
<th>Item type</th>
<th>Location</th>
<th>Collection</th>
<th>Call number</th>
<th>Status</th>
<th>Date due</th>
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</thead>
<tbody>
<tr>
<td>Reference</td>
<td>Aungier Street</td>
<td>Aungier Street Reference</td>
<td>658.8 ARM</td>
<td>Not for loan</td>
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<tr>
<td>1 Week Loan</td>
<td>Aungier Street</td>
<td>Aungier Street Main Lending</td>
<td>658.8 ARM</td>
<td>Available</td>
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<tr>
<td>1 Week Loan</td>
<td>Aungier Street</td>
<td>Aungier Street Main Lending</td>
<td>658.8 ARM</td>
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<td>1 Week Loan</td>
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<tr>
<td>1 Week Loan</td>
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<td>1 Week Loan</td>
<td>Aungier Street</td>
<td>Aungier Street Main Lending</td>
<td>658.8 ARM</td>
<td>Checked out</td>
<td>15/04/2014</td>
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<tr>
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<td>Dame Street Main Collection</td>
<td>658.8 ARM</td>
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<tr>
<td>1 Week Loan</td>
<td>Dame Street</td>
<td>Dame Street Main Collection</td>
<td>658.8 ARM</td>
<td>Available</td>
<td></td>
</tr>
</tbody>
</table>

Browsing Aungier Street Shelves, Collection code: Aungier Street Main Lending
IT'S NOT A BUG
IT'S A FEATURE
Heritage is better!

<table>
<thead>
<tr>
<th>File name</th>
<th>Record ID</th>
<th>Lines</th>
<th>Size</th>
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<tbody>
<tr>
<td>RDRLOANS</td>
<td>88140</td>
<td>13</td>
<td>134</td>
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</table>

<table>
<thead>
<tr>
<th>Record</th>
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<tbody>
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<td>15506*0009</td>
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<td>15730*0152</td>
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<tr>
<td>0</td>
</tr>
</tbody>
</table>
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)
“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)

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Koha External Hosting &amp; Support</td>
<td>€X</td>
</tr>
<tr>
<td>Koha One-off Setup Costs</td>
<td>€2X</td>
</tr>
<tr>
<td>Heritage Support</td>
<td>€2X</td>
</tr>
<tr>
<td>Heritage External Hosting &amp; Support</td>
<td>€4X</td>
</tr>
</tbody>
</table>
Koha is better! (interactivity edition)
The End

Thank You!

Questions?
Comments?

david.hughes@dbs.ie
http://twitter.com/usernameerror