

## Koha Migration Report – November 17, 2016

### Impact on Technical Services - Marci Chen, Librarian Supervisor, Technical Services

- I. Pre-migration activities - rethinking our data to match Koha's user interface
  - Preparing our bibliographic and item records for migration
    - Cleaning up problem records from JJGL opening day collection, OCLC holdings
    - Identifying and fixing call number / collection code / item type mismatches
  - Mapping Polaris collections, item types, and shelving locations to Koha
    - Reducing unnecessary Collections and Item Types (audio collections, AV)
    - Changing collection names to be more user-friendly (Picture Book vs. Easy)
  - Preparing Acquisitions / Ordering
    - Communication with vendors
    - Placing final orders in Polaris
- II. Post-migration activities – adjusting workflows
  - Acquisitions and Receiving
    - Orders and invoice information do not migrate, so necessary to maintain parallel systems (Polaris and Koha) for open orders
    - Juggling multiple scenarios when items arrive, depending on how orders were placed
    - Budget – manually updating book funds in Koha when invoices are paid in Polaris
  - Electronic Data Interchange (EDI) issues
    - Data between vendor and Koha is sent electronically, which automates much of the ordering and receiving process
    - Brodart/Koha – a new partnership
    - Set up requires coordination between ByWater, Brodart, and library staff, and testing is an iterative process
    - We are making progress but EDI is still not totally functional, so orders are being placed manually through Brodart's website
    - Midwest and Ingram EDI is on the horizon
  - Challenges
    - Hot Off The Press items were holdable and showing up in the PAC
    - Mending and Withdrawn statuses are independent of Check Out status
    - More difficult to distinguish AV formats in PAC, so adding customized format information to title field to help patrons and staff
    - Item level holds – only 1 per card
  - Staff reactions
    - Novice catalogers love the Basic Cataloging editor
    - Importing records and cataloging is surprisingly easy
    - Fewer bells and whistles, but this is not always a bad thing
    - Benefits of open source system – we can see how everything works
    - If Plan A doesn't work, we keep trying to develop an alternate solution
    - ByWater and book vendors are providing excellent customer service
    - Team spirit and morale is high!

## **Impact on Patron Services – Gary Landeck, Librarian Supervisor, John and Judy Gay Library**

- I. Major outstanding issues
  - Self-check machines
  - Computer time management software (Envisionware)
  - Interlibrary loan (EZproxy)
- II. Identifying and addressing issues the public may notice
  - Current process for capture and resolution
  - Examples (holds in transit, notifications, reading lists)
  - Ongoing training and best practices
- III. Going forward
  - Why this project was important
  - System updates
  - Measuring use (Google Analytics)